

# A Proposed Study of The 2008 United States Market

3rd Edition Prospectus  
Winter 2008

# Commercial Flooring Maintenance

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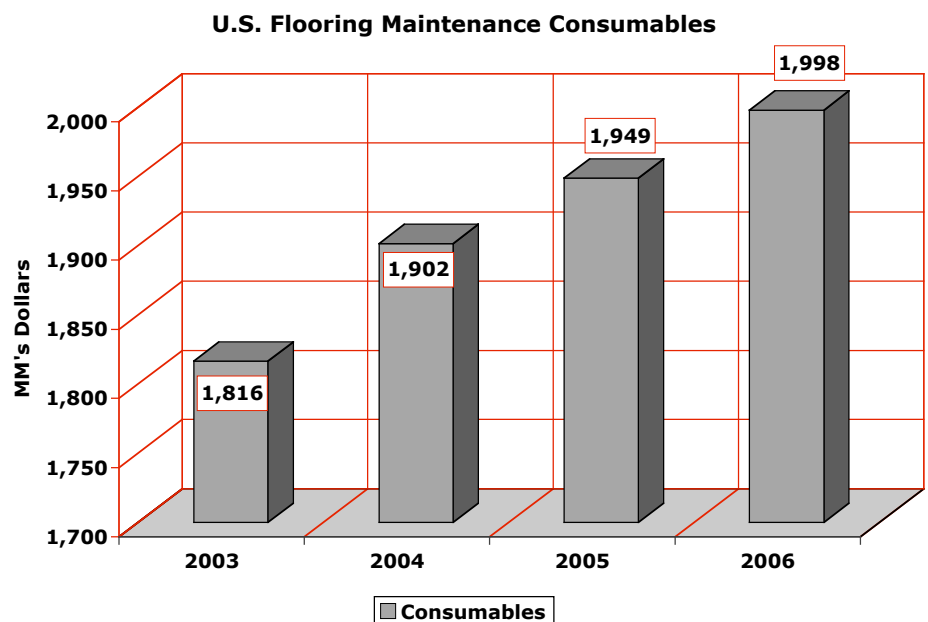
# The 2008 Market For Commercial Flooring Maintenance

## Introduction

Ciprus Limited LLC is pleased to announce the 3rd Edition of The U.S. Market for Commercial Flooring Maintenance. The original study was published in 1998 and second Edition in early 2004.

The Second Edition consisted of 1,390 telephone discussions with flooring maintenance professionals across the United States as well as many hours of additional research. The study provided a thorough review of all major flooring surfaces including Resilient Tile, Resilient Sheet, Carpet and Carpet Tile, Concrete, Stone, Wood and Ceramic Tile. The research also documented flooring maintenance practices by Establishment Type, Size and Area of Application within the Establishment as well as capturing the hours of flooring maintenance by specific maintenance activity, supplies consumed and equipment used.

Many changes have occurred since the last report was published including the move to sustainable and green floor care products and it is now time to launch the third edition of this valuable marketing and planning tool. *As a Charter Subscriber you will have the added benefit of actually designing many of your own research objectives into the study to meet your specific needs.*



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## Important Changes in the 2008 Study

The 2008 Study will incorporate data from our **2006 North American Market for Contract Flooring Multi-Sponsored Study - 4th Edition** to provide square footage information. The study, published in December of 2006, provides detailed data on the installed square footage of each major flooring surface by region and establishment type. This is a very important feature of the 2008 Flooring Maintenance Study.

**Green and Sustainable Products** will also be included due to their increased importance since the last Edition was published.

## What the Study Will Include

The following prospectus has been developed to illustrate what the study will include, how it will be organized and what results can be expected.

**1. Market Size** The report will document the 2008 Market Size in terms of:

- Hours and Dollars of Maintenance Labor
- Units and Dollars of Maintenance Products Consumed
- Equipment Used to Maintain Flooring Surfaces
- Square Feet Maintained

**2. Growth Rates** Past and projected growth by product category, market segment and establishment size will be analyzed over a 6-year time span from 2005 to 2011. Data from the previous study will be included for comparison purposes.

**3. Flooring Surfaces** Seven major flooring Surfaces will be analyzed in depth:

- |                        |                   |
|------------------------|-------------------|
| - Resilient Tile       | - Resilient Sheet |
| - Carpet & Carpet Tile | - Wood            |
| - Concrete             | - Ceramic Tile    |
| - Stone                |                   |

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**4. Establishment Size** The study will analyze flooring maintenance practices and consumption of maintenance products by establishment size as follows:

- <b>Small</b>	- <b>1 to 34</b>	<b>Employees</b>
- <b>Medium</b>	- <b>35 to 249</b>	"
- <b>Large</b>	- <b>250 to 499</b>	"
- <b>Very Large</b>	- <b>500 +</b>	"

**5. Market Segments** The organization of the data will show flooring maintenance practices and consumption of maintenance products by the following market segments:

## SIC Codes Included in the Sample

Flooring Maintenance Category	Major SIC Classification	SIC Description
<u>Offices</u>	60-86	Finance, Insurance, Real Estate
	91-97	Government (Fed./St./Loc.)
<u>Manufacturing</u>	20	Food & Kindred Products
	21-39	All Other Manufacturing
<u>Retail Stores</u>	52	Building Materials
	53	General Merchandise
	54	Food Stores
	56	Apparel Stores
	57	Home Furnishings
	58	Eating & Drinking Places
	59	Misc. Retail Stores
<u>Education</u>	82	Education (elementary, secondary, universities)
<u>Healthcare</u>	80	Health Services (hospitals, nursing care, other labs etc.)
<u>Hospitality</u>	70	Hotels, Motels, Resorts, Casinos
<u>Transportation</u>	41-49	Transportation

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**6. Areas of Application** The study will document flooring maintenance and consumption of maintenance products by specific area of application:

- |                        |                         |
|------------------------|-------------------------|
| - Rest Rooms           | - Selling Floors        |
| - Food Service Areas   | - Physical Plant        |
| - Corridors & Hallways | - Classrooms            |
| - Public Assembly      | - Auto Service Areas    |
| - Offices              | - Storage Areas         |
| - Guest Rooms          | - Shipping & Receiving  |
| - Administrative Areas | - Vehicle Parking Areas |
| - Lobbies              | - Dorm Rooms            |
| - Elevators            | - Manufacturing Areas   |
| - Recreation Areas     | - Entire Facility       |

**7. Maintenance Activities** Specific maintenance practices will be will documented by major and specific categories:

- |                          |                          |
|--------------------------|--------------------------|
| <b>Sweeping</b>          | <b>Washing/Scrubbing</b> |
| - Dry Mopping            | - Shampooing             |
| - Power Sweeping         | - Extraction Cleaning    |
| - Vacuuming              | - Power Scrubbing        |
|                          | - Wet Mopping            |
| <b>Polishing/Buffing</b> | - Spin Bonnet Cleaning   |
| - Burnishing             | - Dry Extraction         |
| - Power Polishing        | - Spot Cleaning          |
| - Recoating/Resealing    | - Pressure Washing       |
| - Waxing                 |                          |
|                          | <b>Resurfacing</b>       |
|                          | - Stripping              |
|                          | - Sand and recoat        |

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8. **Maintenance Products** The use of maintenance products and systems will also be quantified in units and dollars by flooring surface category:

- Cleaners and Shampoos
- Disinfectants and Sanitizers
- Finishes and Waxes
- Pads, Bonnets, Disks
- Strippers

9. **Maintenance Equipment Used and Purchased** will be documented by flooring surface being maintained and by specific maintenance practices.

- Extractors, Bonnet Cleaners, Shampoos
- Buffers, Burnishers
- Power Scrubbers
- Power Sweepers
- Sanders, Strippers, Resurfacers
- Vacuums and Vacuum Systems

10. **Maintenance Frequency** will be analyzed in matrix format by flooring surface, by area of application within the establishment and by market segment and size.

11. **Maintenance Providers** The study will also analyze who is providing flooring maintenance either internally or through the use of outside flooring maintenance contractors. Rationale for internal maintenance or external contractor usage and future decision will be explored.

12. **Trends** Each end-use chapter will pinpoint emerging trends and reasons for growth or decline by flooring type for each application in each market segment:

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13. **Buying Influences** Purchase factors and the decision process will be presented and discussed by each major market segment for each of the maintenance practices and each maintenance product categories.

## Issues and Trends

- Green & Sustainable Products
- Costs - Impact from Cost of Oil
- Durability
- Emerging Technologies
- Equipment Life Cycles
- Life, Safety
- Product Quality
- Regulatory
- Others Found Important

14. **Reasons for Maintenance Practice/Product Selection** Each end-use chapter will describe the reasons why decision makers selected a specific maintenance product or the reasons they utilized a particular maintenance practice

15. **New Opportunities and Un-met Needs** New opportunities will be captured for all maintenance product categories and applications in the study as well as un-met needs in materials or practices.

16. **Projection to Square Feet** The 2008 Edition will include data from the 2006 U.S. Market For Contract Flooring Multi-sponsored Study-4th Edition. Data from this research will be utilized to project maintenance labor and consumables and other factors to the total U.S. installed flooring base. Data will be presented by establishment size and type as well as area of application within establishment type. This feature was added in the Second Edition and greatly enhances the value of the information presented in the final report.

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## Research Methods

The study will be divided into two parts to produce the comprehensive and authoritative study that is planned.

**Part 1 - Establishment Survey** To analyze the 2008 Commercial Flooring Maintenance Market by flooring surface, by establishment type, area of application and establishment size, a statistically valid sample will be drawn. From this sample, shown below, 1,400 detailed telephone interviews will be conducted to project commercial flooring maintenance practices and consumption of maintenance products by market segment and establishment size. *Charter subscribers will have the opportunity to participate in the questionnaire design and sampling procedures.*

### Planned Sample Quotas by Segment & Size

Market Segment	Total	Small	Medium	Large	Very Large
<b>Interviews</b>	<b>1400</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>350</b>
Offices	200	50	50	50	50
Retail Stores	200	50	50	50	50
Hospitality	200	50	50	50	50
Healthcare	200	50	50	50	50
Education	200	50	50	50	50
Manufacturing	200	50	50	50	50
Transportation	200	50	50	50	50

**Part 2** - Several hundred research hours will be expended in the process of conducting face-to-face and telephone discussions with key flooring maintenance industry members including equipment manufacturers, maintenance product manufacturers, leading maintenance contracting organizations and others to provide a thorough analysis of issues and trends currently driving the market.

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## Capabilities & Qualifications

Ciprus Limited is a recognized leader in providing market research and consulting assistance to the Commercial Flooring Industry. The firm conducted the first Commercial Flooring Maintenance Study in 1998 and completed The North American Contract Flooring Market Study in 1991, 1996, 2000 and 2006. Past flooring clients on these studies and proprietary research assignments include:

### Past Flooring & Flooring Maintenance Clients

3M	DuPont Flooring Systems	Permagrain
Allied Fibers	Ecolab	JohnsonDiversey
Alto	Florida Tile	Pergo
Altro Floors	Formica Corporation	Premark
American Olean	Fruedenberg Bldg Systems	Proctor & Gamble
Amoco Fibers	Hartco	Shaw Industries
Amtico	Hoechst Celanese	Solutia
Armstrong World Ind.	Honeywell Fibers	Sweet's Div. McGraw Hill
Azrock Industries	Interface Americas	Tarkett Commercial
BASF	Lees Carpets	TEC Specialty Products
BonaKemi	LG Flooring	Tennant Company
Bruce Flooring	Mannington	TOLI
Clarke US	Mapei	Wilsonart
Collins & Aikman	Milliken & Company	Wool Bureau
Dal Tile	Mitsui Plastics	WW Henry
Domco	Nafco	
Dow Chemical	Nilfisk Advance	

The Principals of Ciprus Limited, LLC are dedicated to providing the highest quality of in-depth market research and consultative information enabling our clients to make informed business decisions.

In addition, the firm's extensive past experience in successfully completing numerous studies in the flooring and floor covering area will be of great benefit to this undertaking as will be the firm's extensive background in working with all facets of the contract furnishings industry.

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## **Deliverables, Pricing & Terms**

Due to the complexity and size of this research project, a significant amount of planning has gone into organizing the report format. Subscribers will find that the statistical charts and graphs will interrelate by chapter heading and will be cross-referenced for easy access. The significant findings of each individual chapter will be brought together in an executive summary section. Flooring surfaces and end-use applications will be treated separately by market segment and will be shown together in a separate chapter for easy reference.

The 2nd Edition contained over 765 pages of text, charts, tables and other visual information. A similar magnitude is planned for the 2008 study.

**Pricing** This study is being offered to charter subscribers for \$24,000. The project will begin on April 15, 2008 and the reports will be issued during the late 4th quarter of 2008 thus allowing the cost to be split between 2 budget years. *Completion timing is dependent upon the timely input from subscribers and upon receiving an adequate number of sponsors to initiate the research.*

*Charter subscribers will have the ability to add topics or modify the research approach at no extra cost where it is believed beneficial to all parties.*

**Terms** One-half the total fee (\$12,000) must be made prior to April 15, and the balance upon receipt of the final report.

The total price of \$24,000 includes consultation after the final report is delivered for discussion and review of the findings.

Three (3) copies of the hard cover report will be included as well as 3 PDF CD copies.

After April 15, 2008 the subscription cost will rise to \$26,000 and will not permit further subscriber study design. When the finished reports are issued, the post subscription price will rise to \$28,000.



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