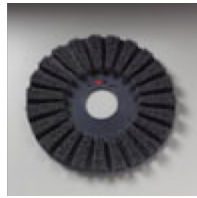


Commercial Flooring Maintenance

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5th Edition Prospectus Spring 2016



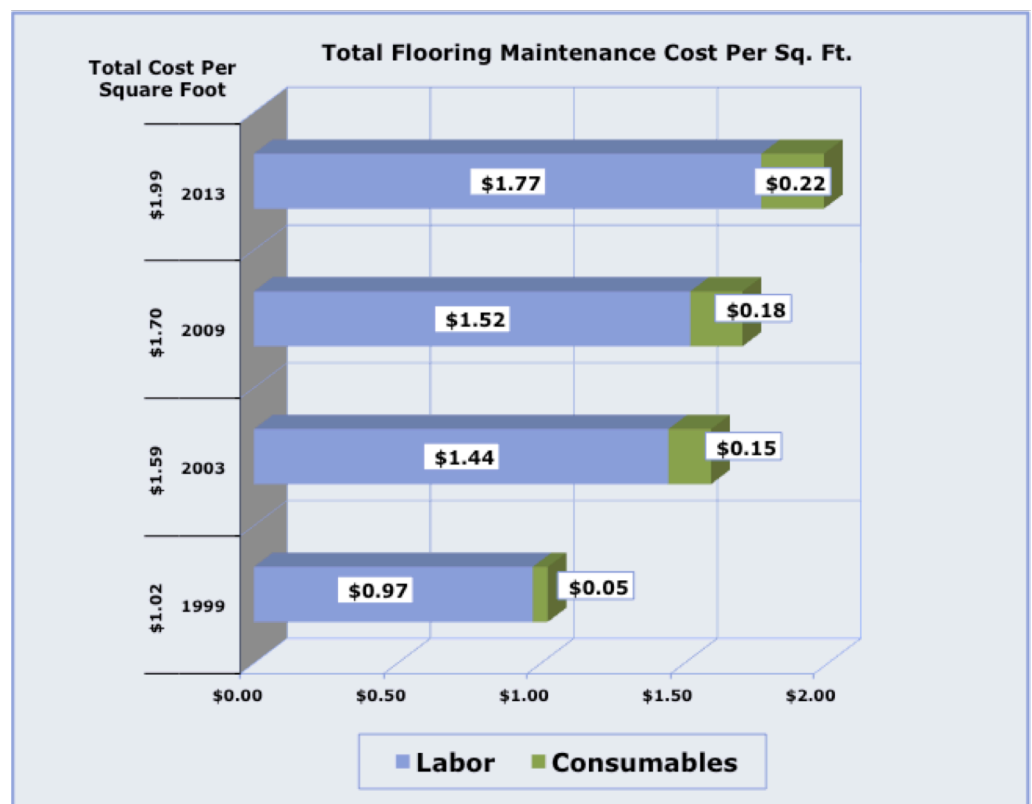
The 2017 NA Market For Commercial Flooring Maintenance

Introduction

Ciprus Limited LLC is pleased to announce the 5th Edition of The North American Market for Commercial Flooring Maintenance. The research was originally published in 1998 and updated in 2004, 2009 and 2013.

The market for commercial flooring maintenance continues to change with the increased use of concrete, the move to luxury vinyl tile and sheet goods not requiring burnishing. Other changes include the reduction of floor finishes and greater use of sustainable chemicals. Equipment is changing too with the use of digital equipment and linking to the internet. All of these points will have a major impact on how floors are cleaned and restored.

The 2017 Report will provide a thorough review of these emerging trends and will include all major flooring surfaces Vinyl Sheet & Tile, Carpet & Carpet Tile, Polished & Unfinished Concrete, Stone, Terrazzo, Factory & Site Finished Wood, Laminate and Ceramic Tile. The study will document flooring maintenance practices within 7 Establishment Types, 4 Sizes and 21 Areas of Application within each establishment. The research will capture the hours of maintenance by maintenance activity, maintenance supplies consumed and the manual and automated equipment used. ***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 2017 Study

The 2017 Study will incorporate all of the parameters and knowledge gained from our 2013 North American Market for Commercial Flooring Maintenance - 4th Edition as well as other past flooring research to provide square footage information. This is a very important feature of the 2017 Flooring Maintenance Study.

Emphasis on Concrete, Luxury Vinyl Tile The use of concrete flooring in commercial buildings continues to grow as does the move to luxury vinyl tile and sheet goods. This research will capture the changes in flooring maintenance due to these trends and provide invaluable data for manufacturers of floor cleaning chemicals and equipment producers and other industry participants.

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.

Market Size The report will document the 2017 Commercial Flooring 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

Growth Rates Past and projected growth by product category, market segment and establishment size will be analyzed over a 16 year time span from 2004 to 2020. Data from the previous 4 studies will be included for comparison purposes.

Flooring Surfaces 11 major flooring surfaces will be analyzed in depth:

Flooring Surfaces Included in the Research		
Carpet & Carpet Tile	Ceramic Tile	Concrete Polished
Concrete Unfinished	Laminate	Linoleum Sheet
Linoleum Tile	Luxury Vinyl Tile (LVT)	Rubber Sheet
Rubber Tile	Solid Vinyl Tile (SVT)	Stone
Terrazzo	Vinyl Enhanced Tile (VET)	Vinyl Sheet
Vinyl Tile (VCT)	Wood Factory Finish	Wood Site Finish

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Market Segments (SIC) The organization of the data will show flooring maintenance practices and consumption of maintenance products by the following market segments:

Establishment Type	Major SIC Classification	SIC Description
Offices		
	60-67	Finance, Insurance, Real Estate
	72	Personal Services
	73	Business Services
	81	Legal Services
	83	Social Services
	20-39	Manufacturing
	50-51	Wholesale Trade
	86	Membership Organizations
Manufacturing		
	20-39	Manufacturing
Retail Stores		
	52	Building Materials
	53	General Merchandise
	54	Food Stores
	55	Auto Dealerships
	56	Apparel Stores
	57	Home Furnishings
	58	Eating & Drinking Places
	59	Misc. Retail Stores
Education		
		Education (Elementary, Secondary, Universities)
Healthcare		
	80	Health Services (Hospitals, Nursing Care, Clinics Dr.s Offices)
Hospitality		
	70	Hotels, Motels, Casinos, Inns
Gov't & Misc.		
	91-97	Government (Federal, State, Local)
	78-79	Amusements
	75	Auto Services
	76	Misc. Repair Services
	89	Other Misc. Services
Transportation		
	41-49	Transportation

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Maintenance Activities Both primary and sub maintenance activities will be documented in great detail by flooring surface.

Primary Activity			
Sweeping		Polishing	
Washing		Resurfacing	
Sub Activity			
Sweeping	Dry Mopping Manual	Washing & Scrubbing Continued	Shampooing (Old Term)
	Sweeping - Manual		Spot Cleaning
	Power Sweeping		Pressure Washing
	Vacuuming		Burnishing
Washing & Scrubbing	Extraction Cleaning	Polishing	Polish/Buff - Low Speed
	Scrubbing - Manual		Power Polish/Buff High
	Power Scrubbing		Resurface/Reseal
	Damp Mopping		Polishing/Waxing
	Wet Mopping - Manual	Resurfacing Finishing Repairing	Resurfacing
	Spin Bonnet Cleaning		Stripping
	Dry Extraction		Sand & Recoat
	Encapsulated Cleaning		Site Applied Urethane
Dry Encapsulation		Repair/Replacement	

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

Areas of Application	
Rest Rooms	Physical Plant/Boiler/Power House
Food Service - Dining Areas	Classrooms
Food Service - Food Counter	Auto Service Areas
Food Service - Kitchen, Back of House	Storage Areas/Warehouse Areas
Corridors & Hallways	Shipping & Receiving
Public Assembly	Vehicle Parking Areas
Offices	Dorm Rooms
Guest Rooms	Manufacturing Areas
Administrative Areas	Entire Facility
Lobbies	Outdoor Pedestrian Walkways
Elevators	Healthcare - Patient Rooms
Recreational Areas	Healthcare - Interventional (OR/ER)
Retail Showrooms/Display Floors	Healthcare - Therapy
Retail Cash Wrap	Healthcare - Diagnostic (Labs)
Pedestrian Walkways	Healthcare - Nursing Stations

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Establishment Size The study will analyze each flooring surface and geographic area by establishment size as follows:

Establishment Size	Number of Employees
Small	1 to 34
Medium	35 to 249
Large	250 to 499
Very Large	500+

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

Maintenance Product Categories (see technical appendix for details)
Cleaners and Shampoos, Encapsulates
Disinfectants and Sanitizers
Finishes & Waxes
Pads, Bonnets, Disks
Strippers

9. **Maintenance Equipment Used and Purchased** will be documented by flooring surface being maintained and by specific maintenance practices as well as the area of application within the facility.

Maintenance Equipment Used and Purchased - by Equipment Family
Extractors, Bonnet Cleaners, Shampooers
Buffers, Burnishers
Power Scrubbers
Power Strippers
Sanders, Strippers, Resurfacers
Vacuum 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.

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11. **Internal Maintenance Providers & Building Service Contractors**

The study will also analyze who is providing flooring maintenance internally or through the use of Building Service Contractors (BSC's). 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.

Issues and Trends	
Green & Sustainable Products	Costs - Impact from Raw Materials
Durability	Emerging Technologies
Equipment Life Cycles	Life, Safety
Product Quality	Regulatory
Greater use of Concrete Flooring	Move to Luxury Vinyl and Sheet Goods

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.

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 2017 Edition will include data from the 2013 North American Market For Commercial Flooring Maintenance as well as other past flooring research. Data from this past 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 type and size as well as area of application within each establishment type. This has been a standard feature since the 2nd 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 2017 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.

Market Segment	Total	Small	Medium	Large	Very Large
Interviews	1400	352	353	352	353
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
Hospitals	67	17	17	16	17
Nursing & Extended Care	66	17	16	17	17
Clinics & Dr. Offices	67	16	17	17	17
Education	210	52	53	52	53
K-12	100	28	27	28	27
Higher Education	100	24	26	24	26
Manufacturing	200	50	50	50	50
Transportation	200	50	50	50	50

Part 2 - Additional research 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 has conducted this Commercial Flooring Maintenance Research in 1998, 2004 2009 and 2013 as well as The North American Contract Flooring Market Study in 1991, 1996, 2000, 2006 and 2015. Past flooring clients on these studies and proprietary research assignments include:

Partial List of Flooring Clients 1986 - 2016

3M	Dow Chemical	Permagrain (Nydre)
Allied Chemical	DuPont Canada	Pergo
Alto U.S. Inc.	DuPont Flooring Systems	Premark
Altro Floors	Florida Tile	Proctor & Gamble
Amoco Fiber	Formica Flooring	Propex
Amtico	Georgia Tech	SC Johnson
Amtico International	Hartco	Shaw Industries
Armstrong World Industries	Celanese	Solutia (Monsanto)
Azrock Industries	Interface Flor	Sweets
BASF	Jackon	Tandus
Bona	Lees Carpets	Tarkett
Bruce Flooring	Mannington	TEC Specialty
Boral Industries	Mapei	Tennant
C & A	Milliken & Company	TOLI
CertainTeed	Mitsui Plastics	Triangle Pacific
Dal Tile	Nafco	Wilsonart
Diversey	Nora	Windsor Industries
Domco	Owens Corning	Wools New Zealand

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 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 4th Edition contained over 2,200 pages of text, charts, tables and other visual information. A similar magnitude is planned for the 2017 study.

Pricing This study is being offered to charter subscribers for \$26,000. The project will begin on May 1, 2016 and the reports will be issued during the 2nd quarter of 2017 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 (\$13,000) must be made prior to May 1, and the balance upon receipt of the final report.

The total price of \$26,000 includes consultation after the final report is delivered for discussion and review of the findings.

Due to the size of this research report, it will be available in PDF format only. Excel copies of the tables and charts will also be made available.

After May 1, 2016 the subscription cost will rise to \$28,000 and will not permit further subscriber study design. When the finished reports are issued, the post subscription price will rise to \$30,000.

Technical Appendix

The exhibits in this appendix consist of the code sheets from the previous research conducted in 2013 and are intended to illustrate the level of detail that will be captured in the 2017 research.

Questionnaire Codes - 1 (7/2012)

Frequency			Units of Measure			
D. Daily	M. Monthly		P. Pint		G. Gallon	
W. Weekly	Y. Yearly		Q. Quart		U. Unit/Piece	
Primary Activity						
	1. Sweeping				3. Polishing	
	2. Washing/Scrubbing				4. Resurfacing (incl. site applied urethane)	
Sub Activity						
Sweeping	5. Dry Mopping-Manual				16. Shampooing (old terminology)	
	6. Sweeping - Manual				17. Spot Cleaning	
	7. Power Sweeping				18. Pressure Washing	
Washing/Scrubbing	8. Vacuuming			Polishing	19. Burnishing	
	9. Extraction Cleaning				20. Polishing/Buffering(Low Speed)	
	10. Scrubbing-Manual				21. Power Polishing/Buffering (Hi Speed)	
	11. Power Scrubbing				22. Recoating/Resealing	
	11A. Damp Mopping				23. Polishing, Waxing	
	12. Wet Mopping-Manual			Resurfacing, Finishing	24. Resurfacing	
	13. Spin Bonnet Cleaning			Repairing	25. Stripping	
	14. Dry Extraction				26. Sand and recoat	
	15. Encapsulated Cleaning				27. Site applied urethane	
					28. Repair, Replacement	
Consumables - Key Types						
	1. Cleaners & Shampoos				4. Pads/Bonnets/Disks/Mops/Brooms/Wipes	
	2. Disinfectants & Sanitizers				5. Strippers	
	3. Finishes, Waxes, Polishes, Sealants (include. Site Applied Urethane)					
Consumables - Specific to Flooring Surface						
Resilient Flooring	1. Cleaners			Carpet/Carpet Tile (Cont)	29. Spin Bonnets	
	2. Disinfectants				30. Spin Cleaners	
	3. Finish - Buffing				31. Stain/Spot Remover	
	4. Finish - Burnishing-High Speed				32. Surface Treatments	
	5. Finish - Burnishing-Ultra High Speed					
	6. Other Pads			Wood	33. Cleaners	
	7. Pad-Polishing-Low Speed				34. Polishes, Waxes	
	8. Pad - Burnishing-High Speed				35. Sand Screen Disks	
	9. Pad - Burnishing-Low Speed				36. Sanding Belts	
	10. Pad - Burnishing-Ultra High Speed				37. Sanding Disks	
	11. Pads - Resurfacing				38. Strippers	
	12. Pads - Stripping				39. Water (damp mop)	
	13. Restorers					
	14. Sand Screen Disks			Concrete	40. Cleaners	
	15. Sealants (incl. site applied urethane)				41. Sealants (incl. site applied urethane)	
	16. Static Dissipaters				42. Coatings	
	17. Strippers				43. Strippers	
	18. Undercoaters				44. Sand Screen Disks	
	19. Polishes, Waxes				45. Polishes, Waxes	
	20. Water - Scrubbing, Water only				46. Water - Scrubbing, Water only	
Consumables - Specific to Flooring Surface						
Carpet/Carpet Tile	21. Deodorizers			Stone/Terrazzo	47. Cleaners	
	22. Dry Foam Shampoo				48. Resurfacing Pads	
	23. Extraction Cleaners/Chemicals				49. Sand Screen Disks	
	24. Pre-Spray				50. Sealants (incl. site applied urethane)	
	25. Sanitizers				51. Polishes, Waxes	
	26. Shampoos				52. Water - Scrubbing, Water only	
	27. Soil Retardants					
	28. Encapsulating Cleaners			Ceramic	53. Cleaners	
				54. Sealants (incl. site applied urethane)		
Other Machine Consumables	59. Brushes			Resilient, Wood Concrete, Ceramic	55. Mop Heads	
	60. Squeegees				56. Dust Mop Treatment	
	61. Batteries				57. Degreasers	
	62. Filters				58. Micro Fiber Wipes	

Questionnaire Codes - 2 7/2012)

Equipment & Key Categories					
Category	Code		Category		
1	1.	Bonnet Cleaners	3	14.	Power Scrubber/Sweeper Combo
2	2.	Floor Machines (Buffers/Polishers)	2	15.	Propane Burnishers
2	3.	Burnisher - High Speed	5	16.	Sanders
2	4.	Burnisher-Ultra High Speed	5	17.	Stripping Machines
1	5.	Extractors-walk Behind	6	18.	Vacuums/Vacuum Systems NEC
1	6.	Extractor-Box & Wand	6	19.	Upright Vacs
1	7.	Extractors-Ride On	6	20.	Canister Vacs
1	8.	Cylindrical Floor Machine (Encapsulants)	6	21.	Back Pack Vacs
1	9.	Combo-Cylindrical Floor & Extractor	6	22.	Wet/Dry Vacuums
3	10.	Auto Scrubbers-Walk Behind	6	23.	Ride-on Vacuums
3	11.	Auto Scrubbers-Ride-On	1	24.	Walk-Behind Vacuums
4	12.	Power Sweepers-Ride-On	1	25.	Wet Mops
4	13.	Power Sweepers-Walk Behind	1	26.	Brooms
Key Equipment Categories					
Bonnet Cleaners, Extraction Cleaners, Mops, Brooms, Wipes			1		
Buffers, Floor Machines, Burnishers			2		
Power Scrubbers			3		
Power Sweepers			4		
Sanders & Strippers			5		
Vacuums and Systems			6		
Flooring Codes					
	1.1	Vinyl Sheet		4.1	Concrete-Unfinished
	1.2	Linoleum Sheet		4.2	Concrete-Polished
	1.3	Rubber Sheet		5	Stone (marble, granite, slate)
	2.1	Vinyl Tile		6	Terrazzo
	2.2	Linoleum Tile		7.1	Wood-Factory Finish
	2.3	Solid Vinyl Tile/Luxury Vinyl Tile		7.2	Wood-Site Finish
	2.4	Rubber Tile		8	Laminate
	3	Carpet/Carpet Tile		9	Ceramic
Areas of Application					
	1.	Rest Rooms		12.	Physical Plant/Boiler/Power House
	2.1	Food Service Areas		13.	Classrooms
	2.2	Food Service - Food Counter		14.	Auto Service Areas
	2.3	Food Service - Kitchen, Back of House		15.	Storage Areas/Warehouse Areas
	3.	Corridors & Hallways		16.	Shipping & Receiving
	4.	Public Assembly		17.	Vehicle Parking Areas
	5.	Offices		18.	Dorm Rooms
	6.	Guest Rooms		19.	Manufacturing Areas
	7.	Administrative Areas		20.	Entire Facility
	8.	Lobbies		21.	Outdoor Pedestrian Walkways
	9.	Elevators		22.1.	Health Care - Patient Rooms
	10.	Recreation Areas		22.2.	Health Care - Interventional (oR/ER)
	11.0	Retail Showrooms/Display Floors		22.3.	Health Care - Therapy
	11.1	Retail Cash Wrap		22.4.	Health Care - Diagnostic (Labs)
Consumables - Decision Maker, Sources					
Decision Maker	1.	Janitor	Purchase Source	1.	Catalogue
	2.	Maintenance Manager		2.	Commercial Cleaning Supply
	3.	Building Owner		3.	Department Store, Wal-Mart, Sears, Target
	4.	Outside Building Service Contractor		4.	Direct from Manufacturer
	5.	Business Owner, Tennant Company		5.	Hardware Store
				6.	Home Depot
Floor Cleaning Equipment		Janitorial, Cleaning Supply		7.	Industrial Supply (Grainger, Fastenal)
Purchase Source		Machine Dealer		8.	Internet
		Direct from Manufacturer		9.	Janitorial Supply
		Internet		10.	Lowes
		Catalogue			