

Commercial Flooring Maintenance

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Commercial Flooring Maintenance in the Era of

Covid-19



6th Edition Prospectus
Spring 2022



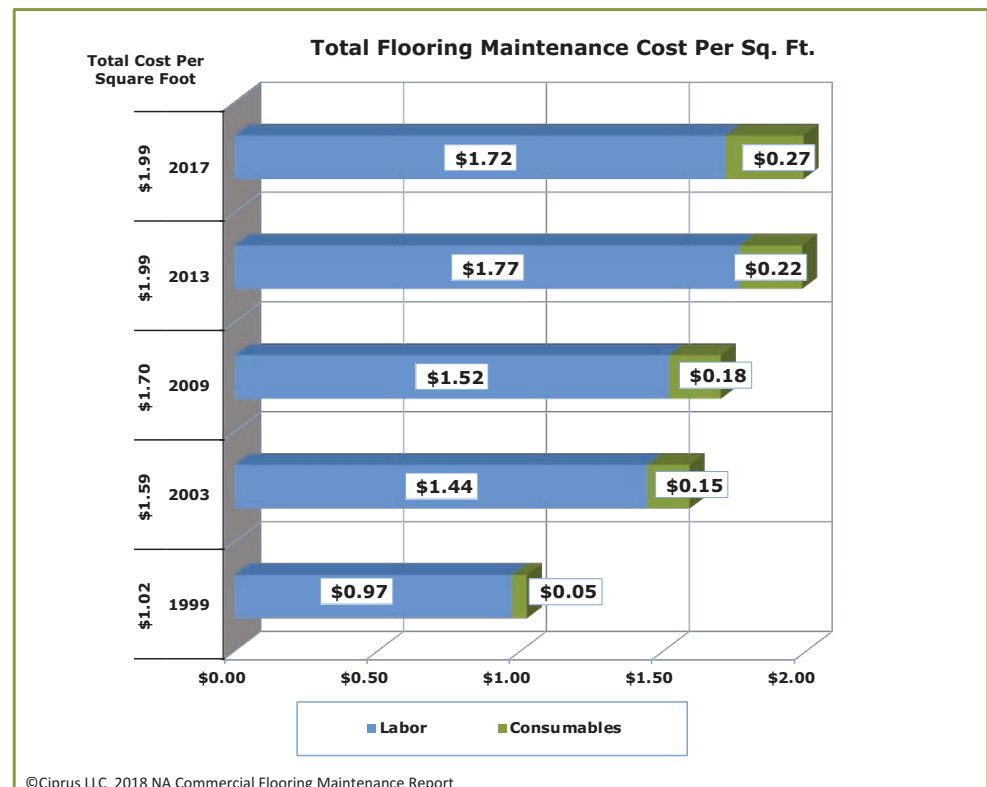
The 2022 NA Market For Commercial Flooring Maintenance

Introduction

Ciprus LLC is pleased to announce the 6th Edition of The North American Market for Commercial Flooring Maintenance. The research was published most recently in 2017 and in 2013, 2009, 2004 and originally in 1998.

COVID-19 The continuing COVID-19 pandemic has required facilities of all types to become more diligent in their cleaning and sanitizing of commercial flooring surfaces. While steps have been taken, in new construction, to provide more cleanable surfaces, the vast installed base of existing flooring must be cleaned, sanitized and maintained to guard against the transmission of the virus. According to leading flooring manufacturers*, cleaning, disinfecting and sanitizing are different aspects of flooring maintenance. Cleaning removes dust, dirt from the flooring surface. Disinfecting is the process of removing harmful microorganisms. Finally, sanitizing is the process of cleaning or sterilizing to reduce the occurrence of bacteria, viruses and fungi. Various products are used to accomplish these activities along with the corresponding equipment.

The 2022 Report will provide a thorough review of current maintenance practices in this era of COVID-19. 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.***



*Mannington Commercial 4/2020

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Important Changes in the 2022 Study

The 2022 Study will incorporate all of the parameters and knowledge gained from our 2017 North American Market for Commercial Flooring Maintenance - 5th Edition as well as other past flooring research to provide square footage information. This is a very important feature of the 2022 Flooring Maintenance Study.

Emphasis on COVID-19

Emphasis on COVID-19 Maintenance Practices With the pandemic still affecting everyday life, facilities must be diligent in their flooring maintenance practices to mitigate the impact of the pandemic. This planned research will document current maintenance practices in a wide array of facilities from healthcare, to educational and institutions to offices, restaurants and public spaces. The data developed will be of great value for cleaning chemical and equipment companies in formulating future plans.

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 2022 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 18 year time span from 2004 to 2022. Data from the previous 5 studies will be included for comparison purposes.

Flooring Surfaces 18 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 report and data will show flooring maintenance practices and consumption of maintenance products by the following end-use 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 (Food 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		
	8211 8221, 9902, 9903 8221-99	Elementary Secondary Universities
Healthcare		
	8062-69 8051-59 8011-49, 8071-99	Hospitals Nursing Clinics Drs 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, Sanitizing, Disinfecting	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, Food Manufacturing
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, Shampoos
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. The impact of COVID-19 will be documented.

Issues and Trends	
Green & Sustainable Products	Costs - Impact from Raw Materials
Durability	Emerging Technologies
Equipment Life Cycles	Life, Safety
Product Quality	Impact of COVID-19
Greater use of Concrete Flooring	Impact of Distribution Delays and Issues

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. **Impact of COVID-19** Have facilities changed their maintenance practices based upon the pandemic? Are these changes temporary for the duration of the pandemic or will they be incorporated on a permanent basis. How have these changes impacted costs?

16. **Projection to Square Feet** The 2022 Edition will include data from the 2018 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 2022 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 - Analysis a significant amount of time is dedicated to understanding the results of the survey including analyzing trend information. This analysis is directed to 3 area that include the maintenance activities undertaken, the consumable maintenance products utilized as well as the equipment used to complete the maintenance. A significant amount of analysis will also be dedicated to understanding the impact of the COVID-19 pandemic and whether changes brought about by the pandemic are expected to be permanent.

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Capabilities & Qualifications

Ciprus LLC 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, 2018 and 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 - 2022		
3M	Dow Chemical	Permagrain (Nydre)
Allied Chemical	DuPont Canada	Pergo
Alto U.S. Inc.	DuPont Flooring Systems	Premark
Altro Floors	Florida Tile	P & G Professional
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 - HB Fuller
Boral Industries	Mapei	Tennant
C & A	Milliken & Company	TOLI
CertainTeed	Nafco	Triangle Pacific
Dal Tile	Nilfisk-Advance	Wilsonart
Diversey	Nora	Windsor Industries - Karcher
Domco	Owens Corning	Wools New Zealand

The Principals of Ciprus 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.

The final report will be organized by end-use markets including Offices, manufacturing, retail, education, healthcare, hospitality and transportation.

The 5th Edition contained over 2,300 pages of text, charts, tables and other visual information. A similar magnitude is planned for the 2022 study.

Pricing This study is being offered to charter subscribers for \$26,000. The project will begin on May 1, 2022 and the reports will be issued during the 4th quarter of 2022.

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, 2022 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 \$32,000.