



**International  
Market  
Strategy**



**International strategic market research and  
consultancy on building product and related markets**



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**PROPOSAL FOR A SYNDICATED  
RESEARCH PROGRAMME ON  
SELECTED ASPECTS OF THE  
EUROPEAN BATHROOM  
PRODUCTS MARKET**

**Special Research on:**

- **Bathroom Accessories**
- **Shower Accessories**
- **Bathroom Furniture**
- **Pool Spas**
- **The Commercial, Industrial and  
Institutional (CII) and Contract Sectors**



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## 1. INTRODUCTION

CONSULT GB's regular annual multi-client programme on bathroom product markets in Europe covers 30 countries on an annual basis, and offers detailed information on 5 core product families:

- bath tubs and shower trays
- ceramic sanitary ware and plastic cisterns
- sanitary taps and mixers
- shower wall products
- hydrotherapy products.

This combination of countries and products (together with a similar coverage of heating products) is probably a sensible maximum for CONSULT GB to cover in its main programme if it is to avoid extending its deadlines and/or substantially raising the present subscription levels.

However it does leave some significant areas of the bathrooms market that are covered only sketchily (if at all) in the annual reports and their supporting database. These gaps have long been recognised by CONSULT GB, and special add-on studies were carried out in selected countries on the CII (commercial, industrial and institutional) market in 2001, bathroom furniture (2001), bathroom accessories (2002) and on kitchen sinks and mixers (2001 and 2003). CONSULT GB has also conducted supplementary research on bathroom product distribution (2003), and has undertaken a major study on pool spas (2002-4).

Now several regular clients have expressed the wish to see CONSULT GB revisit some of these areas before the original research becomes too out of date. Consequently, this proposal sets out the scope of a new programme of supplementary research, to be completed by the end of 2004, covering:

- the CII markets for bathroom products, possibly extending to the “contract sectors” of residential new build and refurbishment
- bathroom furniture
- bathroom accessories
- shower accessories
- pool spas.

The selection of countries to be covered will depend to some extent on the level of client interest. Section 5 of this proposal suggests some “packages” for each of the product/market areas (partly related to which countries have been studied before), and also enables clients to “trigger” research in any given country to suit those clients’ particular needs.

## **2. AIMS OF THE STUDY**

### **2.1 OVERALL AIMS**

The primary aim of the programme would be to provide clients with essential up-to-date information on certain market sectors:

- bathroom accessories
- bathroom furniture
- shower accessories
- pool spas
- the commercial, industrial and institutional sectors (CII market) and possibly contract residential new build and refurbishment

which cannot economically be covered within CONSULT GB's regular multi-client programme.

### **2.2 PRODUCT SPECIFIC MODULES**

For the four product specific sectors listed above, CONSULT GB would aim to set up a database service close to that already provided for the product sectors covered by the annual programme, including internationally comparable data on:

- market sizes and trends and forecasts, by product sub-category
- market values and average prices
- market sizes by price segment
- main suppliers with market shares
- profiles of leading manufacturers/suppliers, including details of product ranges and distribution policies and practices (including, for example, OEM and private label supply arrangements)
- forecasts of key trends relating to all of the above topics.

In addition, “Common Modules” would cover:

- background socio-economic and construction trends data
- distribution data including:
  - information on distribution structures



- profiles of leading distributors.

### **2.3 CII AND CONTRACT SECTORS**

The primary aim of the programme would be to provide clients with updated information on the structure and characteristics of the commercial, industrial and institutional (CII) and “contract” markets for bathroom and sanitary products, including:

- identification and structural analysis of key sectors
- patterns of installation
- activity and trends (new build and replacement) per sector
- decision making processes and influences
- distribution patterns and practices
- for selected product families:
  - working estimates of CII market sizes and indications of key trends
  - supply structures and market share estimates per product category
  - typical prices and price ranges
  - product developments and innovations.

**Fig. 3.1 EUROPEAN COUNTRIES COVERED BY CONSULT GB**

<b>16 country western European programme</b>	
Country	Country
France	Switzerland
UK	Austria
Germany	Ireland
Italy	Greece
Spain	Denmark
Portugal	Norway
Belgium	Sweden
Netherlands	Finland
<b>14 country central and eastern European programme</b>	
Country	Country
Poland	Russia
Czech Republic	Ukraine
Slovakia	Romania
Hungary	Bulgaria
Estonia	Slovenia
Latvia	Croatia
Lithuania	Turkey

### **3. SCOPE OF THE STUDY**

#### **3.1 GEOGRAPHICAL SCOPE**

For each of the 4 product/market modules covering bathroom furniture, bathroom accessories, shower accessories, and the CII markets (+ the Common Modules), CONSULT GB is offering the research on two different bases of pricing:

- on a unit price basis per country/module, enabling clients to select modules and countries to suit their specific needs. The full list of 30 European countries covered by CONSULT GB is shown in Fig. 3.1
- in form of a 9 country package, on which CONSULT GB is offering a package discount to advance subscribers. This package includes:
  - France
  - UK
  - Germany
  - Italy
  - Spain
  - Belgium
  - Netherlands
  - Russia
  - Poland.

For details of pricing please see Section 6.

For pool spas, CONSULT GB is proposing to cover the countries listed above plus:

- Austria
- Switzerland
- Norway
- Sweden
- Czech Republic.

#### **3.2 SCOPE OF COVERAGE PER SECTOR**

##### **3.21 BATHROOM FURNITURE**

The study would focus on fixed bathroom furniture. It is envisaged that the broad segmentation of the market would be as follows:

- base units
- mirror units

- separate cupboard units.

### **Base Units**

These would be further segmented by the following criteria:

- by countertop material:
  - synthetic
  - ceramic
  - glass
  - marble
  - other (including MDF)
- by base unit furniture (casing) material:
  - chipboard
  - MDF
  - solid wood/other
- by type of basin:
  - wash basin only
  - counter top basin
  - vanity basin.

### **Mirror Units**

These would be further segmented as follows:

- for mirror cabinets, by type of material:
  - chipboard
  - MDF
  - solid wood/other
- for mirrors with lighting (which are generally sold as part of a set with the base units, with lighting almost always included)
  - light strip
  - light fittings.

### Separate Cupboard Units

These would be segmented:

- by positioning:
  - floor standing
  - wall hung
- by material:
  - chipboard
  - MDF
  - solid wood/other.

### 3.22 BATHROOM ACCESSORIES

The study would focus on plastic, metallic, ceramic and glass bathroom accessories, including:

- soap holders
- towel holders (bars and rings)
- toilet paper holders
- tissue paper holders
- towel and bathrobe hooks
- toothbrush holders and tumblers
- soap dispensers
- waste paper bins
- shower storage units
- toilet brushes
- others.

It will be noted that WC seats and covers are not included in the above list. CONSULT GB would consider including them given sufficient interest from this specific sector of the industry.

### 3.23 SHOWER ACCESSORIES

This module will cover:

- flexible hoses
  - metalised plastic & similar
  - metal
    - double stapled
    - single stapled
  - braided polypropylene
  - PVC
    - reinforced (ribbed)
    - nylon reinforced (not ribbed)
    - simple PVC
- shower handsets
  - 3 function
  - 2 function
  - 1 function
- supports and bars
  - supports
    - conical
    - other
- bars
  - with conical holder
  - with hook holder.

A distinction would also be made as to whether these products are sold individually and those sold in sets.

### 3.24 POOL SPAS

The pool spas market is split between:

- portable pool spas

- inground pool spas
- swimspas.

Other distinctions refer to:

- type of material
- type of surface effect
- colour.

### 3.25 CII AND CONTRACT MARKETS

#### 3.251 Market Sectors

There are two broad sectors which make up that part of the market which involves professional end users, purchasers and/or specifiers:

- the CII (Commercial, Industrial and Institutional) market encompassing all non-housing installation of bathroom products
- the “contract” side of the housing market involving:
  - new build of collective or grouped dwellings
  - refurbishment of groups of dwellings.

#### 3.2511 *CII Sectors*

In principle, the part of the study would cover all non-housing sectors whose establishments use sanitary products. This is obviously a very broad spectrum, and it may be necessary to focus on specific sectors. The broad sectors would be:

- offices/public administration
- institutions (hospitals, schools, old people’s homes, prisons, armed forces)
- industrial and wholesaler premises
- travel, tourism and catering
  - public WC’s
  - highway petrol stations and rest areas
  - railway stations

- airports
- hotels
- restaurants and cafés.

Both new building and renovation/replacement would be included.

### 3.2512 *Housing “Contract” Market*

Under this heading would be covered that part of the housing market which involves the selection and purchasing for a plurality of dwellings, by professionals employed by or acting for parties other than the individual householder or occupier. This would include, for example:

- for new housing construction:
  - apartment buildings/collective housing
  - grouped housing/housing estates
- for refurbishment/RMI, planned multiple dwelling schemes run by:
  - local authorities and other public sector bodies
  - housing associations, HLM’s and other private subsidised housing bodies
  - private landlords.

### 3.252 CII/Contract Market Product Scope

The CII/contract market part of the programme would be first and foremost an analysis of structures and procedures, but the study would also provide some product specific data. The precise product focus would be adapted to suit the specific requirements of the advance subscribers, but, as in the 2001 study, the main emphasis would be on:

- taps and mixers (including shower mixers and controllers, and self closing valves)
- ceramic sanitary ware (plus plastic cisterns and their mechanisms, and composite washbasins)

with some coverage also of patterns of demand for:

- bath tubs
- shower installations

- hydrotherapy products
- complete bathroom installations (if any).

### **3.3 DISTRIBUTIVE TRADE SCOPE**

The study would contain, within the product specific modules, information on distribution flows and practices. A separate module (common to all products) would provide information on distribution structures in each country, backed up by company profiles of the most important distributors.

The study would cover all main channels of distribution of bathroom products including:

- wholesalers/merchants
  - specialist sanitary (or heating and sanitary) wholesalers (lightside merchants)
  - generalists (mixed merchants)
- DIY superstores
- showrooms run by
  - wholesalers/merchants
  - specialist bathroom retailers
- kitchen and furniture channels
- direct marketing and distribution (including supply-and-fit operations)
- e-commerce.

Also included would be:

- superwholesaling/factoring, i.e. wholesalers selling-on to
  - other wholesalers
  - showrooms and boutiques
  - DIY superstores
- the role of the installer.

### **3.4 TIME SCALE**

The programme would aim first and foremost to provide a static fix on each sector, taking 2003 as the base year for the study, with estimates of key trends in 2004 to date.

It is unlikely that it will be possible to provide precisely quantified series, but the studies will indicate:

- key recent trends
- the likely direction of the markets over the next 5 years.

## **4. REPORTING FORMATS & INFORMATION TO BE COLLECTED**

### **4.1 OVERALL APPROACH**

It is intended that the programme as set out in this proposal should be offered in a flexible, modular format which would allow clients to buy into the programme to suit their particular needs, but which would also allow more substantial reports to be built up.

Specifically, the programme, per country, would be made up of:

- 2 modules common to all the products:
  - background data (socio economic and demographic)
  - structural analysis of the distributive trades handling bathroom products

which would be drawn from CONSULT GB's latest (2004) annual reports on bathrooms (thus subscribers to the annual report for the country in question would not need to re-subscribe to these common modules)

- product specific modules, i.e. those covering:
  - bathroom furniture
  - bathroom accessories
  - shower accessories
  - pool spas.

CONSULT GB would compile the reports for these modules using the Filemaker database facility, which is already familiar to existing subscribers to CONSULT GB's annual bathroom product reports. The reports themselves would be offered in database format (Filemaker Runtime on CD-ROM), in PDF on CD-ROM, and in hard copy

- CII modules, which lend themselves less readily to database treatment, and would therefore be prepared in conventional formats (PDF on CD-ROM and hard copy).

### **4.2 COMMON MODULES: COUNTRY BACKGROUND DATA**

Key background data on each country is presented as follows:

- demographic summary
  - comments

- statistical summary of demographic data
- summary of **macro-economic** trends and forecasts
  - statistical summary
  - comments
- summary of **construction** trends and forecasts
  - overall construction trends
    - statistical summary
    - comments
  - housing construction
    - statistical summary
    - comments
- structure of **demand**
  - construction industry, building contractors, installers etc.
    - comments
    - statistical summary
  - specifiers
    - statistical summary
    - comments
- **legislation**, regulations and standards
  - summary
  - details of key developments.

### 4.3 COMMON MODULES: DISTRIBUTIVE TRADE STRUCTURES

For each country there would be provided an analysis of the structures of distribution of bathroom products. The precise categories of distributor covered may vary between countries according to local circumstances, but are likely to include:

- lightside merchants (heating, sanitary and plumbing wholesales)
- heavyside merchants (building materials distributors)
- mixed merchants/wholesalers

- factors/”Sortimenter” and other wholesalers/distributors supplying wholesalers and retailers
- do-it-yourself retailers
- specialist retailers
- manufacturers’ own distribution structures
- on-line internet procurement initiatives.

Structural Tables and comments will be provided on each relevant sector. These would be backed up by company profiles of the leading distributors, created on the Filemaker database.

#### **4.4 PRODUCT SPECIFIC MODULES**

##### **4.41 FILEMAKER DATABASE**

For the four product specific modules, it is intended to offer data in a flexible, modular format which would allow clients to buy into the programme to suit their particular needs, but which would also allow more substantial reports to be built up. The programme would be created on CONSULT GB’s Filemaker database which offers a number of advantages over conventional methods of report presentation:

- from the database, CONSULT GB can rapidly make up packages of modules to individual clients’ orders
- it enables, where suitable, aggregated analyses to be made (e.g. merchants’ share across a range of products)
- clients buying into a substantial part of the service can be provided with their own copy of the database to enable easy retrieval of specific data as required. Filemaker Runtime versions of the database can be supplied to a client without the need for that client to obtain a Filemaker licence. While clients cannot alter or add to data on the database itself, much of the data can be exported for further analysis
- it allows for easy updating and revision, including the progressive development of time series (e.g. for market shares) in future years.

#### 4.42 FORMATS

It is proposed the data specific to a given product market in a given country should be presented in the form of an expanded version of CONSULT GB's well known "Yellow Pages" and company profiles formats. The intention would be to provide a more manageable reporting format without losing any of the essential detail and analysis typically contained in CONSULT GB's reports. These product/market modules:

- would be created on the database
  - would comprise:
    - a condensed introductory/explanatory text with sub headings referring to each set of quantified data
    - quantitative database:
      - market size, trends and forecasts (aim for at least 1995-2003 + forecasts to 2008, but the database should allow for longer historical forecasts to be entered where they are readily available, as potential inputs for, for example, econometric modelling). These series would normally be in volume, except for certain products (eg. bathroom accessories) where value (@ constant prices) is the only realistic unit of quantification
      - market value @ msp (base year), supplemented by additional price segmentation analyses as relevant
      - splits by end user sector:
        - new housing (split public/private)
        - housing RMI (split DIY or BIY/professional)
        - non housing
- This analysis would be expressed in value @ msp to allow for aggregations using the interactive function of the database
- further product segmentation (base year: where clear series for sub categories are available they should be incorporated into market trends database)
  - market shares (base year but with database facility to build up series in subsequent years)
  - distribution, to include distribution flows (shares by distributive trade/route to market). This would be done in value as well as volume to allow for aggregated analyses of, for example, shares by trade sector
  - other non standard analyses; the database allows for non standard tables to be pasted in from Excel

- company profiles of leading manufacturers/suppliers/distributors (CONSULT GB already has a facility on the database which accesses company profiles via the market share tables).

## 4.5 CII AND CONTRACT MARKETS

### 4.51 STRUCTURAL ANALYSES

#### 4.511 CII Sectors

For each of the CII sectors listed in Section 3.25, CONSULT GB would provide:

- a structural analysis of the existing stock in terms of:
  - number of establishments, if possible by broad size category
  - ownership structure and patterns and identification of major players
- an analysis of new building activity and trends.

#### 4.512 Contract Housing Sectors

##### 4.5121 *New Build*

The analysis would include:

- identification of the main types of new build activity undertaken in each country with regard to collective and grouped housing, plus trends
- analysis of the structure of:
  - initiation
  - constructionand identification of major players.

##### 4.5122 *Refurbishment/RMI*

This would include:

- identification of main types of work/projects undertaken and trends in levels of activity
- major players in the sector (categories, types of organisation, significant individual players).

#### 4.52 CII SECTORS: INDICATION OF SANITARY EQUIPMENT INSTALLATION AND DEMAND

This section of the report will attempt to provide information on the patterns of demand for sanitary products by the CII sector in total and per segment where possible, showing:

- indications of typical sanitary installations per existing establishment (by size category) in terms of:
  - numbers of installations (wash rooms etc)
  - typical products and fittings per installations (according to these listed in Section 3.231)
- as above, for new build.

#### 4.53 DECISION MAKING STRUCTURES, PROCEDURES AND INFLUENCES

This section would describe in as much detail as possible typical purchasing structures and procedures per segment and sub segment (eg large organisations/single establishment organisations, private/public sector, new building/refurbishment/renovation and maintenance) including:

- identification of decision makers and those influencing purchasing decisions. This would include the role of central and local management and of contractors/installers on:
  - decisions on types of products
  - decisions on brands/suppliers
- procedures followed
- rules, regulations and legislation.

Also included would be an appreciation of the factors influencing purchasing decisions and typical brand preferences of the deciders per product category.

#### 4.54 DISTRIBUTION

This section would analyse the typical patterns of distribution to the CII and contract housing sectors in terms of:

- direct supply by manufacturers/importers vs supply via wholesalers or other distributors
- the role of installers as distributors in
  - securing project business
  - project planning
  - project logistics
- structure of the distributive trades with special reference to any specialisation in CII/contract business.

#### 4.55 SUPPLY

CONSULT GB would provide an analysis of the structure of supply for each of the product categories listed in Section 3.231 including:

- identification and market shares of the main manufacturers/importers
- special strengths in the CII/contract market compared with the one-off housing market
- special sectorial strength within the CII/contract markets
- product ranges, prices etc with special references to products specifically designed for CII use
- product development and innovation
- commercial and marketing approaches.



## **5. METHOD**

CONSULT GB would take as a starting point its annual multi client programme on bathroom products to which the potential clients for this new programme are already subscribers and which has already been updated to 2003 for all the countries already listed in Fig. 3.1.

### **5.2 PRODUCT SPECIFIC MODULES**

The methodology would be based on CONSULT GB's long established supply side industrial market research techniques, including:

- desk research of secondary sources
- a programme of personal and telephone interviews with:
  - manufacturers and importers
  - distributors at the wholesaler (merchant) and retailer levels.

### **5.3 CII & CONTRACT HOUSING MARKETS**

The CII/contract market and its sub segments are complex, fragmented, poorly documented and often difficult to define. Any study of these sectors could involve an almost infinite level of research input. In particular, any attempt to gross up from demand side samples is fraught with danger. Thus it is necessary to adopt a methodology which will provide a reliable working basis of knowledge of these markets on a cost effective basis.

Past experience has shown that a valid study can be achieved based on the following inputs:

- statistical structural analyses of each of the main CII/contract segments covering:
  - stock of establishments
  - new build
- drawing on:
  - government statistics
  - trade/industry statistics
  - special studies
- selected demand side interviews with:



- in house decision makers
- contractors/installers
- a thorough programme of supply side interviews with:
  - manufacturers
  - importers
  - distributors.

This allows any quantification of product market sizes in the CII market and (separately) the contract housing market to be approached from 2 angles:

- theoretical calculations based on secondary data and research interviews on the demand side
- opinions from manufacturers and importers (supply side estimates).

**Fig 6.1 MODULE PRICE SCHEDULE (2004 SUBSCRIPTIONS)**

	Price excl. VAT per Module (excluding Pool Spas)					Advance Subscriber Package Prices (excl. VAT)						Pool Spas (excl. VAT)	
	Product Modules			CII/Contract Housing	Common Modules (1)		2004 Bathrooms Report Subscribers (1)			Other Advance Subscribers (1)			
	Bathroom Accessories	Bathroom Furniture	Shower Accessories		Background Data	Distribution Structures & Profiles	1 Product Module	CII/Contract Housing	3 Product Modules + CII	Common Modules +:			
				1 Product Module						CII/Contract Housing	3 Product Modules + CII		
France	£650	£650	£650	£900	£450	£5 265	£7 290	£20 520	£8 910	£10 935	£23 760	£900	
UK	£650	£650	£650	£900	£450							£900	
Germany	£650	£650	£650	£900	£450							£900	
Italy	£650	£650	£650	£900	£450							£900	
Spain	£650	£650	£650	£900	£450							£900	
Belgium	£650	£650	£650	£900	£450							£900	
Netherlands	£650	£650	£650	£900	£450							£900	
Poland	£650	£650	£650	£900	£450							£900	
Russia	£650	£650	£650	£900	£450							£900	
Portugal	£650	£650	£650	£900	£450								£900
Austria	£650	£650	£650	£900	£450								£900
Switzerland	£650	£650	£650	£900	£450								£900
Ireland	£650	£650	£650	£900	£450								
Greece	£650	£650	£650	£900	£450								
Denmark	£650	£650	£650	£900	£450								
Norway	£650	£650	£650	£900	£450								£900
Sweden	£650	£650	£650	£900	£450								£900
Finland	£650	£650	£650	£900	£450								
Czech Republic	£650	£650	£650	£900	£450								£900
Slovakia	£650	£650	£650	£900	£450								
Hungary	£650	£650	£650	£900	£450								
Estonia	£650	£650	£650	£900	£450								
Latvia	£650	£650	£650	£900	£450								
Lithuania	£650	£650	£650	£900	£450								
Ukraine	£650	£650	£650	£900	£450								
Romania	£650	£650	£650	£900	£450								
Bulgaria	£650	£650	£650	£900	£450								
Slovenia	£650	£650	£650	£900	£450								
Croatia	£650	£650	£650	£900	£450								
Turkey	£650	£650	£650	£900	£450								

Note (1): Clients who have already purchased the main relevant 2004 CONSULT GB country report on Bathroom Products would not be required to pay for the Common Modules.

 = not available

## 6. TIMING AND COSTS

The modular schedule set out in Fig. 6.1 can be seen as an ongoing one, which in theory could eventually encompass all 5 modules in each of the 30 countries, with the research required to complete such a task possibly running over several years. However for the immediate future CONSULT GB proposes (based on client requests), to promote a package of research which encompasses 9 countries, to be completed by the end of 2004:

- France
- UK
- Germany
- Italy
- Spain.
- Belgium
- Netherlands
- Russia
- Poland

As shown in Fig. 6.1, these countries are subject to special advance subscription package deals. This does not preclude kicking off with modules in other countries as well. These would be offered at the module prices indicated in Fig. 6.1.

The pool spas research would be offered in the 14 countries in which CONSULT GB has already carried out pool spas research.

Please note that the “Common Modules” providing macro-economic data and analyses of distribution structures will be drawn largely from data contained in CONSULT GB’s main annual multi-client studies on bathroom products. Consequently clients who have already purchased these reports will not be charged for the “Common Modules” for the same country or countries.

The payment terms for advance subscribers would be 60% on signing the contract and 40% on completion of the reports.

