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Consulting Project International Market Research for Leica Geosystems AG

Project Team (f. l. t. r.) in front [Jelle De Quartel](#), Windesheim University of Applied Sciences, The Netherlands; [Denis Lekaj](#), FHS St.Gallen, Switzerland, Project Leader; **behind** [Chantal Dütsch](#), FHS St.Gallen, Switzerland; [Jérémie Fleury](#), FHS St.Gallen, Switzerland; [Marla Galar Labayen](#), Public University of Navarre, Spain (not on the photo); [Solenne Gelle](#), BBA Inseec Lyon, France (not on the photo)

Market Analysis "Digital Templating" in the stone industry

Templating is an application which is used in the case of kitchen, fireplace and other interior installations and allows professionals to measure the existing installation. This data is then used to create accurate CAD templates, which are used in CNC machines. The 3D Disto Leica Geosystems offers can be seen as the bridge between reality and CAD. Therefore, the aim of the project was to analyse the competitive landscape and to provide transparency around the ecosystem of templating.

Proceeding

To get a better insight of templating, the project team focused on the stone industry. Therefore, market research was conducted in the D-A-CH region, Benelux countries, France, UK and Italy. The project group called 211 companies, whereby, in total, 49 companies actually agreed to an interview and completed the survey together with the project group. Furthermore, the project team conducted interviews with the stone associations from Austria and Germany, with the European & International Federation of Natural Stone Industries and competitors. The findings of the expert interviews were then combined with the results of the survey and the secondary research.

Results

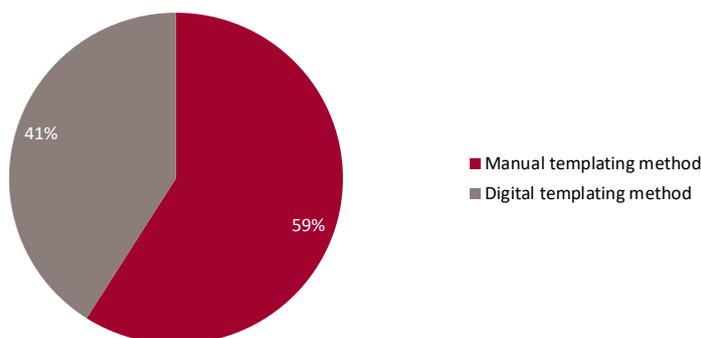
The results of the market analysis show that the manual templating process is more popular than the digital equivalent at the moment. 59% of the stone shops answering the phone survey

claimed that they work with manual tools in the measurement process. The most mentioned reasons for not changing into the digitalized option are because of high investment costs and the traditional mindset of several stone shop owners. However, the number of stone shops using the digital method is rising steadily since a digital tool provides advantages with regard to efficiency and handling. In particular, the Swiss stone shops seem to be willing to invest in a digital measurement tool since three out of four shop owners are interested in changing their method.

The project team eventually divided the templating industry and its stone shops into three main customer segments that are based on the knowledge gained in the market analysis. For each of these segments the project group described the demands and the behavior.

www.fhsg.ch/praxisprojekte

Which templating method is used in your company? (n=49)



Used templating method overall overview

Source: own illustration based on phone interviews

Leica Geosystems AG, Heerbrugg

Leica Geosystems (LGS), part of Hexagon, is revolutionizing the world of measurement and survey for more than 200 years. Today, LGS creates complete solutions for professionals across the planet. With precise and accurate instruments, sophisticated software, and trusted services, LGS delivers value every day to those shaping the future of our world.

Client

Leica Geosystems AG, Heerbrugg
 Johannes Hotz; Business Director Disto
www.leica-geosystems.com



We were very pleased to see the enthusiastic and motivated manner in which the students approached the given topic – especially when considering the challenging times during the Covid-19 lockdown. Thanks to their high degree of identification with the project tasks, we received very valuable information. The outcome confirmed what we already knew and will provide an excellent foundation for our future business decisions.

Coach

FHS St.Gallen

Mathias Kleiner, MBA



The team overcame all resistance to realise a well-developed research design. They gained insightful information about a very specific market with expert interviews, online survey, and desk research. The well-founded analysis and the recommendations support the client's business decisions. The satisfaction of the client was the most valuable compliment.