AIA

The Architect's Journey to Specification 2019

In collaboration with: construct connect Deltek

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Introduction

Dear colleague,

In 2016, AIA embarked on a research strategy to learn about the habits, preferences, challenges, and needs of architects with respect to the selection and specification of building products and construction materials, a topic that affects everyone involved in the construction continuum. The resulting series of studies, the "Architect's Journey to Specification," explores the personas, habits, and considerations of the architect and building product manufacturer stakeholders involved in the product selection process.

What we have learned through the Architect's Journey to Specification initiative is that while thorough, thoughtful, and informed product selection remain hallmarks of a successful firm, productivity challenges are significant. Architects aren't investing adequate time into these efforts, and access to correct and complete product information and resources to support the specification process is difficult. Building product manufacturers struggle to maintain updated libraries of digital assets essential for reaching and educating architects, such as specification content, environmental product declarations, and submittal sheets. Firms, too, must curate their internal knowledge base of non-visual product information to ensure they have the latest versions of specification data available from manufacturers.

Adding to the complexities of the challenge is the expectation that architects must be the advocates for improving the impact of the built environment on the environment and human health. Large firms aside, most architects in the United States lack the resources to do all of the above.

The greatest road block, however, resides in securing commitments from clients and contractors to fully realize the possibilities of the architect's design intent. We believe this is where building product companies and design professionals have the greatest opportunities for strategic alignment. The focus of the fourth Architects Journey to Specification, in 2020, will be to address these factors and identify pathways for supporting architects in designing a better world.

In 2019, we decided to assess how product and material specification has evolved. The following report compares AIA members' perspectives in 2019 versus our initial research in 2016. It is clear from the results that economic, political, and social forces are shaping firm cultures and specification practices. The effects of this evolution on the important relationship between architects and building product companies are both promising and concerning.

As you review this report's content, assess your organization's role in creating positive change through a strategic view on specifications. They represent a two-dimensional perspective of a building's design and are an important element of the legal framework around construction of a building. To take that practice seriously, and to advocate for realization of its intent, is to uphold the value and importance of the built environment to humanity.

John Crosby

Managing Director, Corporate Partnerships, AIA

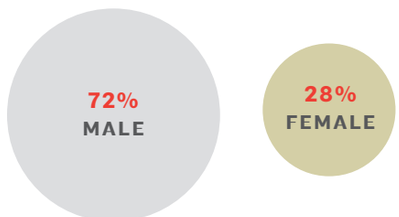
Chapter 1
Profiling respondents

Respondent profile (1/2)

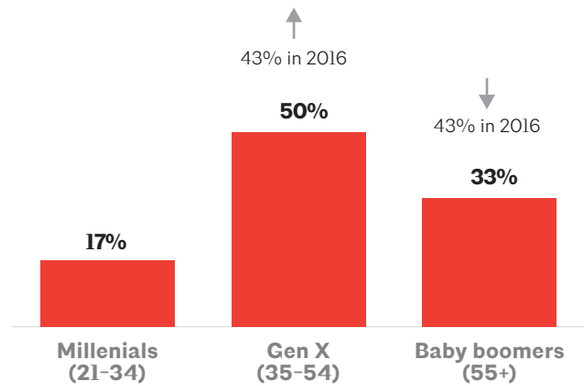
365

Qualified architects who are responsible for specifying products and/or materials surveyed online

Gender



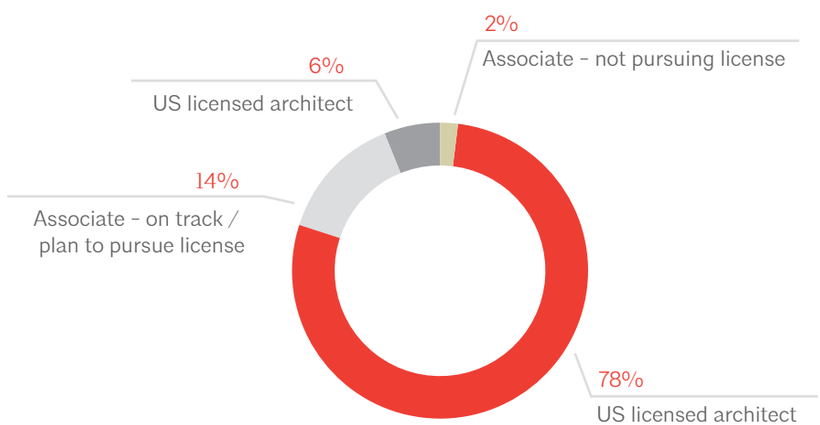
Age



Job Role

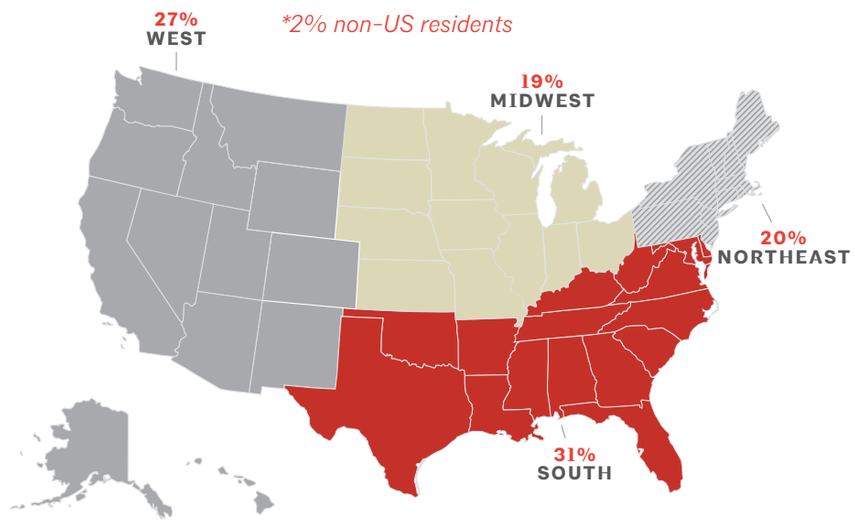
Architect	**58%**
Principal / partner	20%
Project manager	13%
Intern	3%
Designer	3%
Specifier	2%
Other	1%

AIA member type



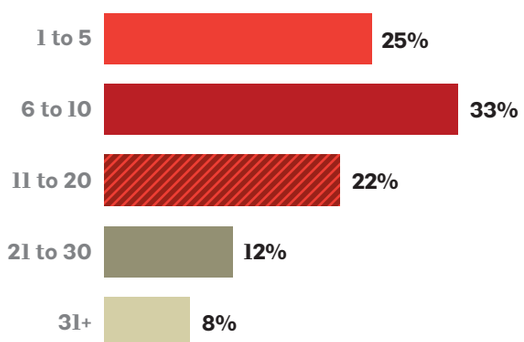
Region

*2% non-US residents

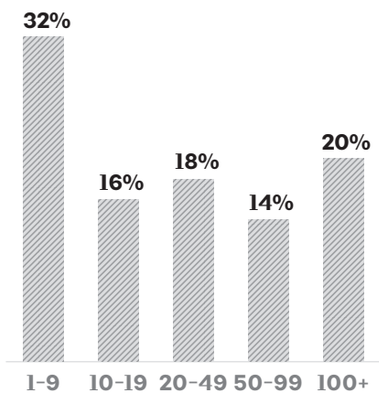


Respondent profile (2/2)

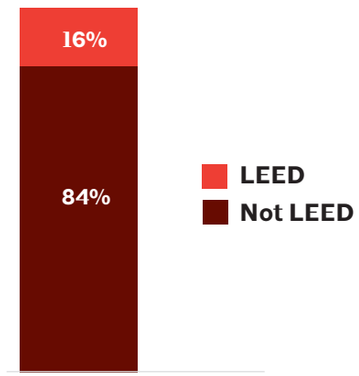
Number of projects per year



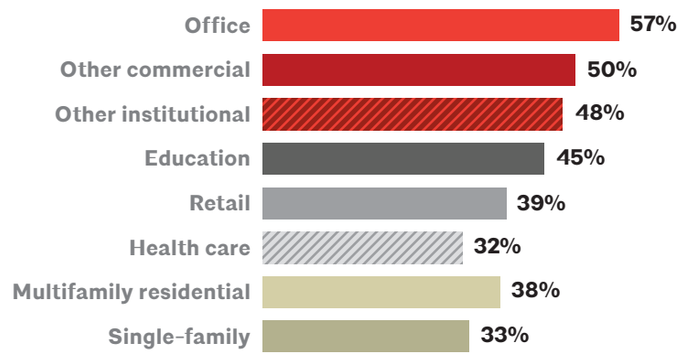
Number of employees



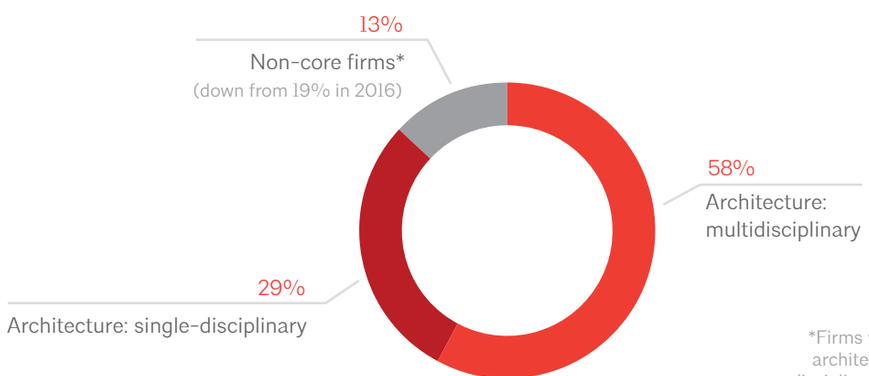
Projects resulting in LEED



Project type involvement

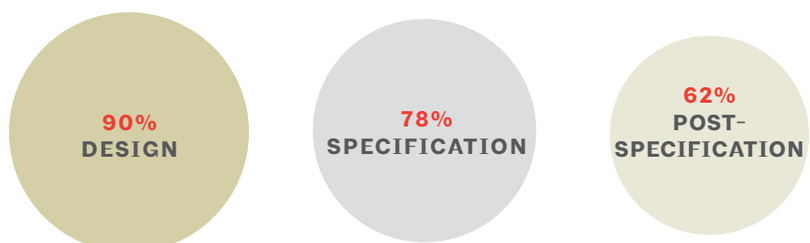


Firm type



*Firms whose primary business is not architecture but have an architecture discipline at their firm (e.g. engineering, interior design and planning)

Spec journey involvement



Overview of the psychographic personas

37%

CONSERVATIVES

41% in 2016

Who they are
More likely to be older males, half are baby boomers.

Firm culture
Tend to work for more risk averse firms that will use tried and tested products.

How they specify
Tend to specify products and brands they have specified in the past. Hesitant to change, they value built up trust with the manufacturer.

34%

DYNAMISTS

33% in 2016

Who they are
Tend to be younger, tech minded architects.

Firm culture
Experimental and open-minded. Willing to try different products.

How they specify
Will use BIM / CAD models when designing and specifying. Like to engage manufacturers digitally, and prefer initiating contact with a manufacturer to being contacted.

29%

RISK TAKERS

26% in 2016

Who they are
More likely to be female architects. Often only focus on a few projects in a given year.

Firm culture
Open to trying different products to find the most environmentally friendly option.

How they specify
More likely to conduct research before identifying the right manufacturer. Highly concerned with compliance.

Chapter 2
Key learnings

Key learning: changes in the journey to specification

Four major trends changing how products are discovered and considered

What this means for manufacturers: Manufacturers are increasingly pitched against consultants for the role as trusted advisors, which architects want them to be. Responsiveness and category-wide expertise will be key to winning architect trust over consultants. Given the impact of technology, it is imperative to be listed on, and integrated with, software platforms. The increasingly open firm culture offers opportunities for manufacturers to engage with architects and pitch new products if they optimize their website and increase rep responsiveness.

Finally, CE remains important as a way to ensure new products are introduced to architects.

General research	Design stage	Specification stage	Post-spec stage
The rise of consultants: Consultants (e.g. roofing, paint consultants) are growing in importance as influencers across the whole specification journey; sometimes at the expense of manufacturers.			
The impact of technology: Architects rely more on products from colleagues' projects, and social media to learn about new products. Part of this is enabled by the rise of project collaboration software, spec software / office masters.			
Shifts in firm culture: Firm culture has significantly changed since 2016, becoming less conservative, and more outspoken, flexible to change and more likely to take risks on new solutions. This is in part driven by technology and the increased reliance on external influencers.			
The role of continuing education: CE is becoming a more important source for keeping on top of trends and new products. However, it is less effective for getting to know manufacturers. This is partly because many have already become familiar with manufacturers through CE, and because some will go online to research manufacturers instead.			

Key learning: changes in the design stage

Information needs are changing as design is becoming more collaborative

What this means for manufacturers: Manufacturers remain less involved in design, except for instances where relationships are strong. Architects would value help and advice as they are managing more hands-on clients. Manufacturers should also remember to focus on (interior) designers within firms, which are increasingly involved. While still emerging, social media is growing as a way to find product inspiration. Manufacturers should focus on relevant content on their own social media channels, and positive promotion among influencers. Finally, manufacturers need to be listed and up-to-date in relevant specification, project management and collaboration software used by architects.

General research	Design stage	Specification stage	Post-spec stage
	More stakeholders involved: Consultants and interior designers are becoming more involved and influential in design. Hands-on clients are also becoming more common. Manufacturer involvement remains limited; usually to passively providing information through the website or responding to inbound requests.		
	Social media: Architects are increasingly looking to social media for inspiration in the design stage; while only 16% use social media today, that is almost twice as many as in 2016. Younger architects in particular use this media.		
	Changing digital needs: While still important, technical product descriptions and (downloadable) specs are used less; particularly by millennials architects, who increasingly rely on product libraries (internal and in software) and products from other projects within the firm.		

Key learning: changes in the specification stage

Manufacturer influence on specification is waning

What this means for manufacturers: Architects should remain a core target audience for manufacturers, as they remain key to specification and usually specify a manufacturer brand. While a segment of manufacturers engage architects well; many have not adjusted to the role that architects expect manufacturers to play; both in terms of rep expertise and responsiveness, specification support and how a manufacturer website is judged and used by architects.

See 'The Architect's Journey to Specification: Rethinking the relationship between architects and manufacturers (2018)'.

General research	Design stage	Specification stage	Post-spec stage
		Architects still specify brand: Architects remain key to specification. A notable number of specs are closed; and brand is commonly specified. This is reinforced by a growing tendency to copy and paste past specs. Reference standards are less commonly specified than three years ago.	
		Manufacturers are losing ground to consultants: Manufacturers are losing influence to consultants when it comes to specification. While only 26% consider consultants a top 3 influencer, this is a notable increase from 9% in 2016.	
		Manufacturers have not adjusted to changes in architect needs: Architects are significantly less satisfied with manufacturers than in 2016. Many manufacturers have not caught up with expectations of reps (notably category expertise and responsiveness) and still have cumbersome websites.	

Key learning: changes in the post-specification stage

The GC is getting more involved and architects want closer co-operation

What this means for manufacturers: Most manufacturers have reps and a strategy focused on the contractor, sub-contractor and architect/design community. As project management is becoming more integrated, the support provided by manufacturers should also be more integrated. Architects still specify brands, and closely scrutinize swap requests. However, substitutes are usually judged by quality and compliance rather than brand; so manufacturers must make this information easy to find, when their product is being considered as a substitute.

General research	Design stage	Specification stage	Post-spec stage
			General contractors are more involved: The GC is more involved and influential as collaboration and design-build is becoming more common. Architects are positive about early involvement of the contractor. Some contractors now provide the expertise and support architects have traditionally expected from manufacturers.
			Architects are divided about the reliability of the contractor: 55% of architects trust the skills of contractors and their ability to estimate time/cost. But only 1 in 5 architects trusts that product swaps are in the client's best interest.
			Architects review swap requests but rarely hold brand: Almost all architects only approve substitute requests from the contractor if quality and compliance is comparable. 25% require a well-known brand and 20% require a brand they have experience with.

Chapter 3
Shifts in firm culture

Seven measurements of firm culture

To better understand the culture of firms our specifying architects work in, we asked them to rate their agreement with each opposing statement below on a scale of: 'only slightly-', 'somewhat-' or 'strongly agree'. This scale is identical to 2016.

Environmental: "We have a strong focus on the environment and sustainability when it comes to specification."	**ENVIRONMENTAL FOCUS**	**Non-environmental:** "We tend not to focus on the environment and sustainability when it comes to specifications."
Outspoken: "We have a dynamic and outspoken culture."	**CULTURE OF INTERACTION**	**Studied:** "We have a quiet and studied culture."
Flexible: "We keep our options open, stay flexible, and focus on the big picture."	**PLANNING CULTURE**	**Structured:** "We focus on getting the job completed with structured early planning."
Risk taker: "We encourage all ideas even if some of them will fail."	**RISK CULTURE**	**Risk averse:** "We prefer to use ideas that we know will be successful."
Open ideation: "We believe the best ideas come from working with external sources."	**IDEATION CULTURE**	**Closed ideation:** "We believe the best ideas come from within the architecture studio."

Base: 365
All respondents

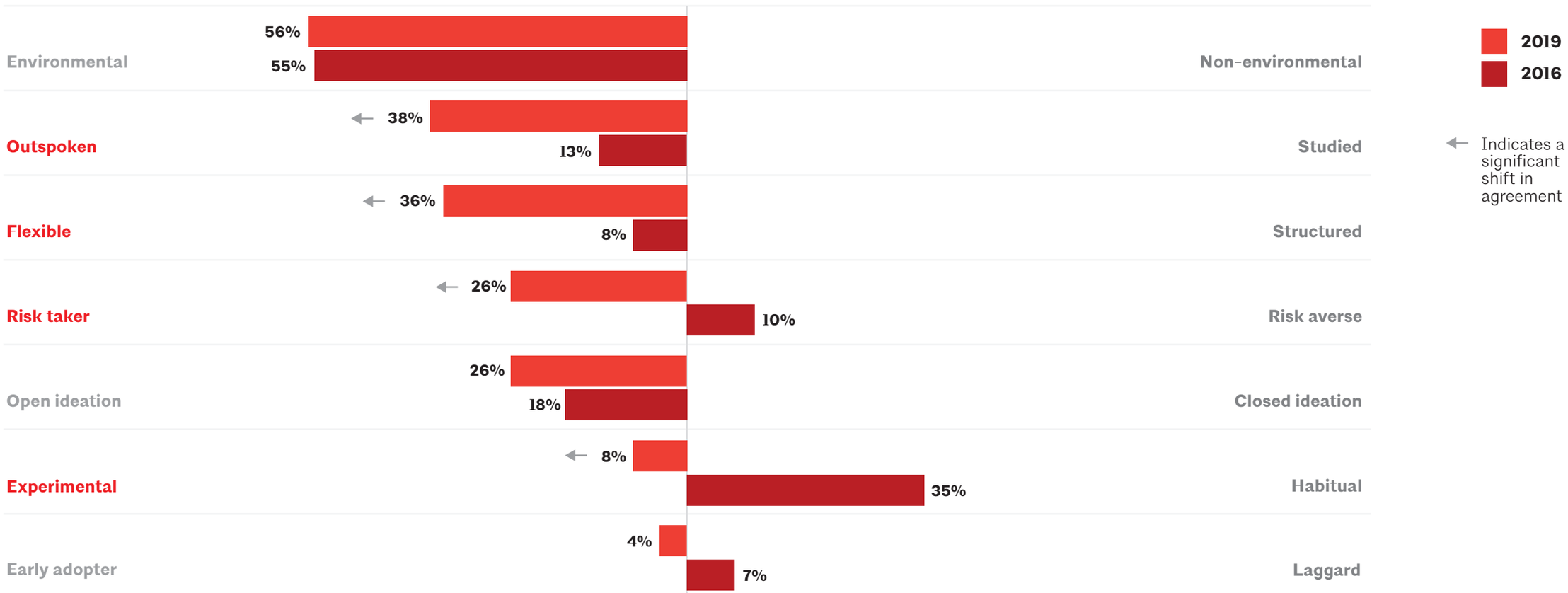
Q8. Please read each pair of opposing statements and indicate which statement best describes your organization and the level of your agreement with that statement by choosing a point on the scale.

Firm philosophy

Firms have become increasingly experimental; willing to take risks

Compared to 2016, firms in 2019 are much more experimental, outspoken, and open minded. This trend could suggest that they will be more willing to try different manufacturers and products during specification. It offers opportunities for manufacturers who engage architects well.

This shift is driven by factors like: collaborative/social technology, growth of external influencers (e.g. consultants) and generational change.

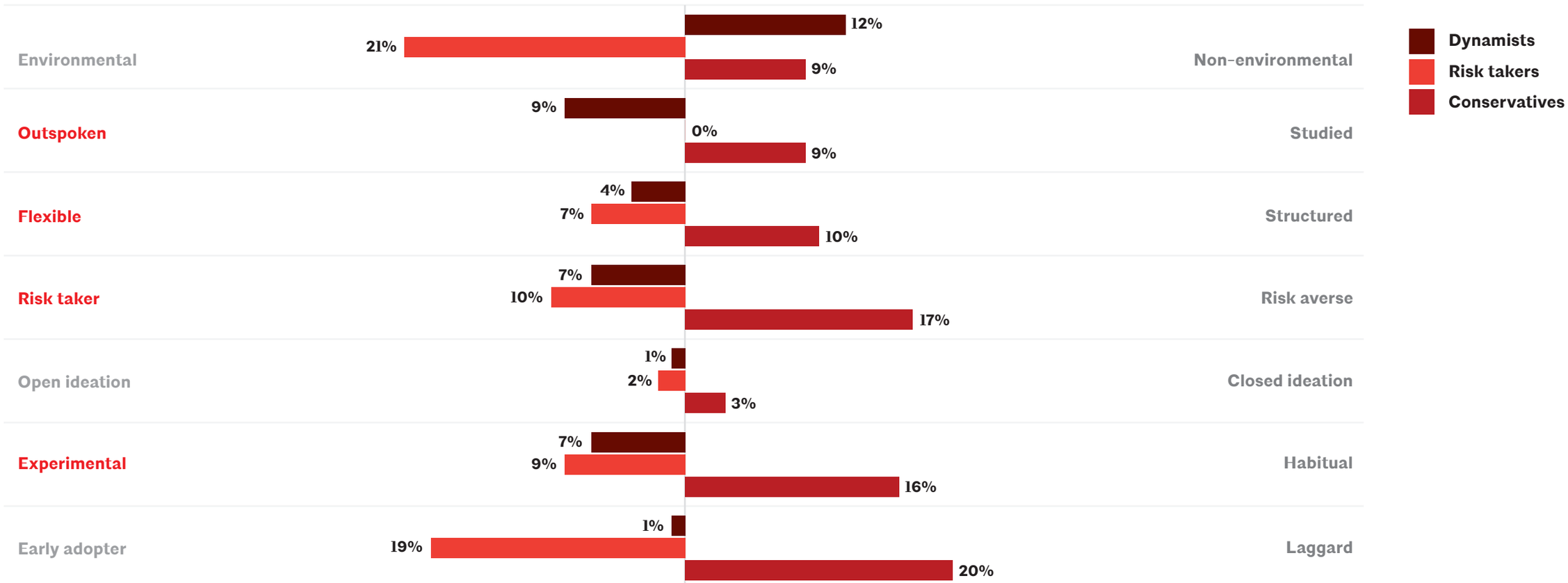


Base: 365
All respondents

Q8. Please read each pair of opposing statements and indicate which statement best describes your organization and the level of your agreement with that statement by choosing a point on the scale.

Firm philosophy by persona

Conservatives remain less willing to experiment



Base: 365
All respondents

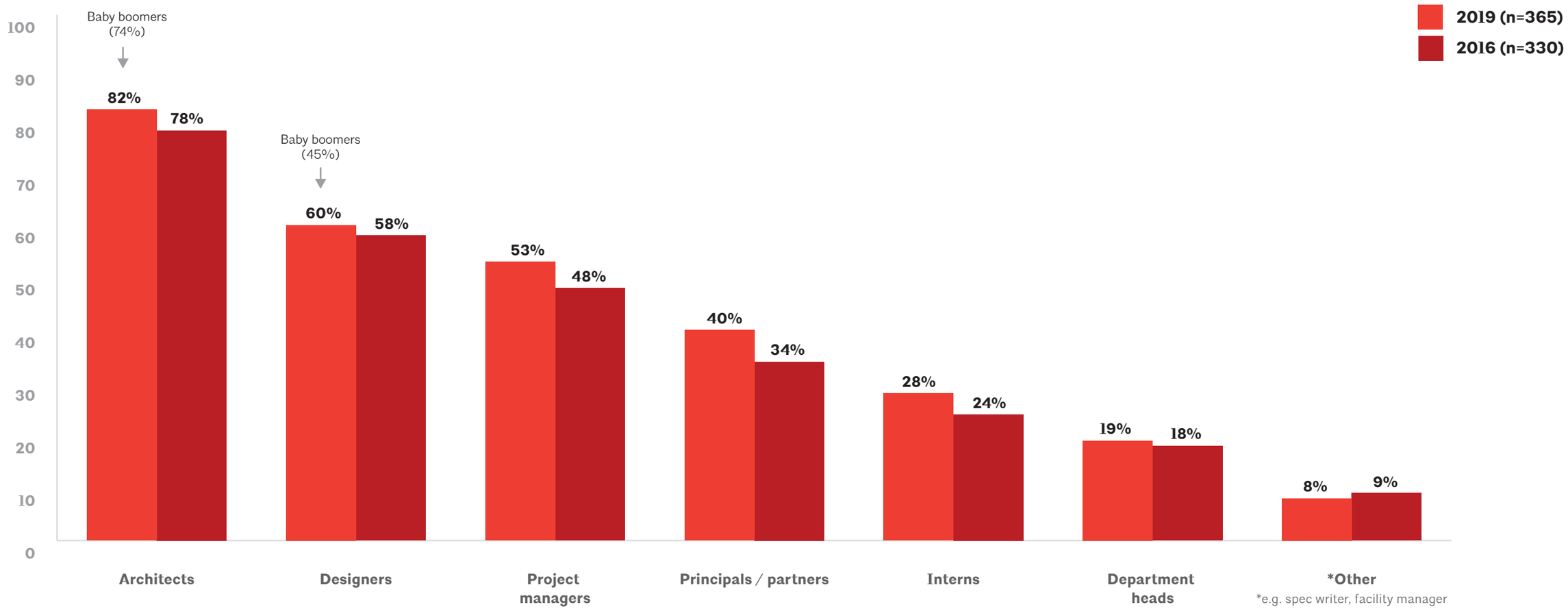
Q8. Please read each pair of opposing statements and indicate which statement best describes your organization and the level of your agreement with that statement by choosing a point on the scale.

Chapter 4
Trends in learning about new materials

Researching new products and materials

Architects remain the most frequently involved with researching new products

Architects remain key to specification: 4 in 5 have responsibility for finding out information about new products/materials at their firm. Designers and project managers take on this role as well, but less frequently. Results are consistent with the 2016 wave.



Base: Varies
By wave

Q9. Within your firm, whose role is it to find out information about new products/materials?
Q10. Which is the most influential?

Researching new products and materials

Architects remain key to discovering new products across all firm types

		FIRM SIZE			FIRM TYPE		
	All firms	Small (1-19)	Medium (20-99)	Large (100+)	Single-disciplinary architecture	Multi-disciplinary	Non-core
BASE	365	173	118	74	106	210	49
Architects	82%	74%	86%	96%	75%	90%	65%
Designers	60%	42%	74%	81%	36%	75%	51%
Project managers	53%	46%	60%	57%	44%	58%	49%
Principals / partners	40%	54%	33%	19%	45%	39%	33%
Interns	28%	25%	30%	35%	24%	33%	18%
Department heads / senior managers	19%	15%	20%	28%	12%	21%	27%

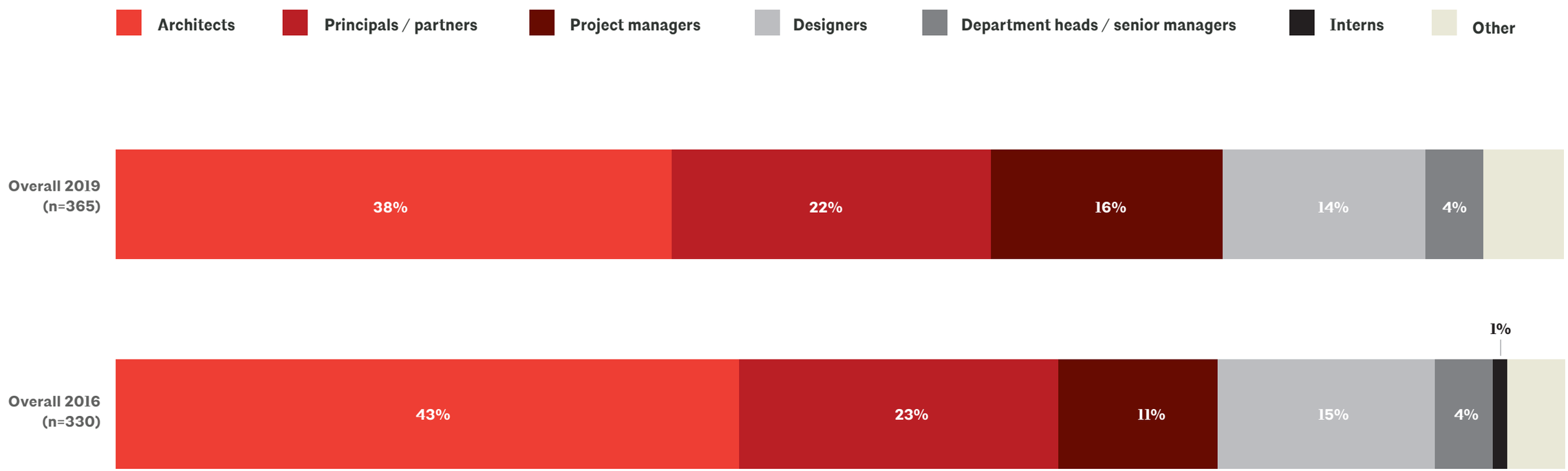
Sig. higher
Sig. lower

Base: Varies
By firm size/type

Q9. Within your firm, whose role is it to find out information about new products/materials?
Q10. Which is the most influential?

Most influential for researching new products

Consistent with results from the past wave



Base: 365
All respondents

Q10. Which is the most influential?

Most influential for researching new products

Small firm principals are more ‘hands on’

		FIRM SIZE			FIRM TYPE		
	All firms	**Small (1-19)**	**Medium (20-99)**	**Large (100+)**	**Single-disciplinary architecture**	**Multi-disciplinary**	**Non-core**
BASE	**365**	**173**	**118**	**74**	**106**	**210**	**49**
Architects	43%	42%	42%	46%	46%	43%	33%
Principals / partners	23%	36%	14%	4%	32%	19%	18%
Designers	15%	8%	18%	27%	4%	20%	16%
Project managers	11%	9%	14%	11%	12%	10%	12%
Department heads / senior managers	4%	2%	6%	7%	1%	3%	14%
Interns	1%	1%	0%	0%	1%	0%	0%

Sig. higher
Sig. lower

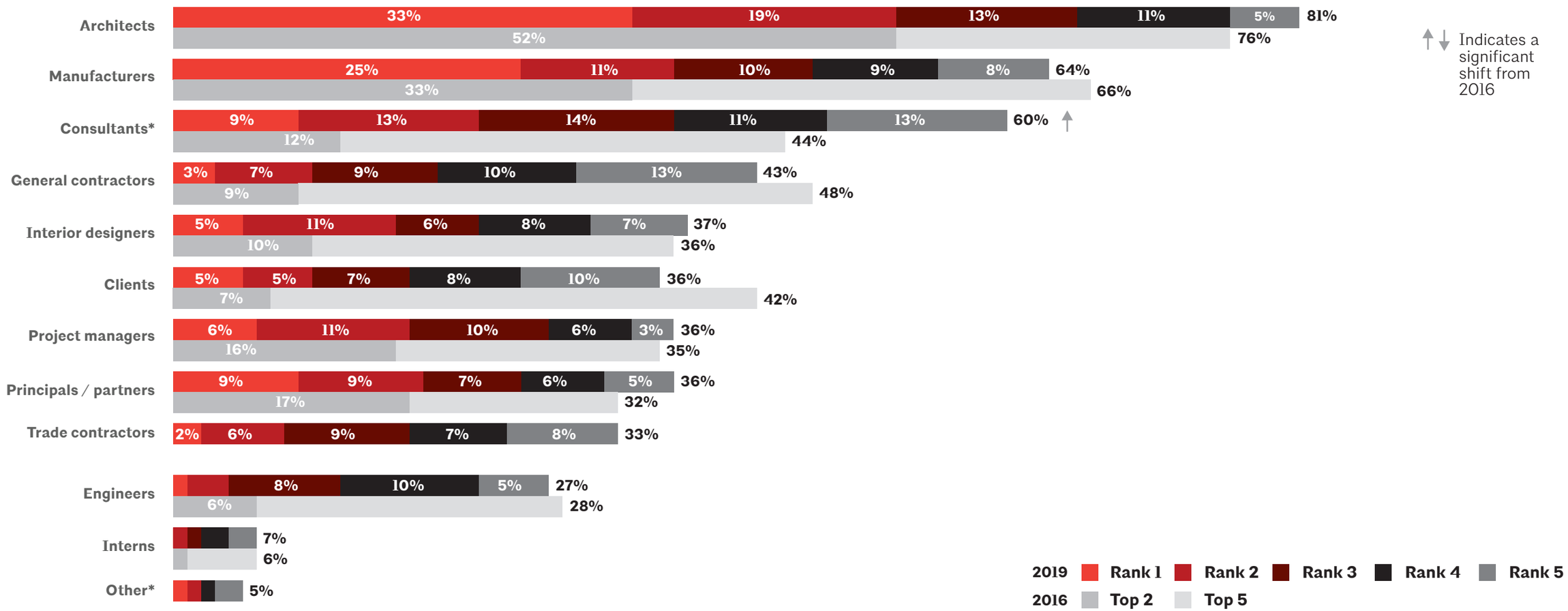
Base: Varies
By firm size/type

Q10. Which is the most influential?

Influencers for learning about products/materials

Consultants are growing in influence

Consultants have become significantly more important over the past few years as 3 out of 5 architects now consider their architect colleagues a key influence. Note, influence of consultants may have been understated during the 2016 wave because the survey referred to them as 'External consultants / thought leaders.' Influence of other roles fairly equal to three years ago.



Base: 365
All respondents

Q11. Thinking generally, who are your key influencers in terms of learning about products/materials?
* 'external consultants / thought leaders' in 2016

Influencers for learning about products/materials

Small firms rely more on the GC

Small firms are more likely to rely on general contractors for information about new products because they lack internal expertise, likely build up local relationships with contractors, and might be getting less attention from manufacturers.

Differences by age and firm type:

–Baby boomers are significantly less likely to rely on interior designers (26%)

–Multi-discipline firms significantly more likely to use interior designers (50%), single discipline significantly less likely (17%)

		FIRM SIZE		
	All firms	Small (1-19)	Medium (20-99)	Large (100+)
BASE	365	173	118	74
Architects	81%	74%	86%	86%
Manufacturers	64%	64%	61%	69%
Consultants	60%	62%	56%	59%
General contractors	43%	51%	33%	41%
Interior designers	37%	23%	47%	57%
Project managers	36%	26%	47%	42%
Clients	36%	41%	32%	30%
Principals / Partners	36%	40%	38%	22%
Trade contractors	33%	38%	33%	20%
Engineers	27%	33%	23%	20%
Interns	7%	8%	8%	3%

Sig. higher

Sig. lower

Base: Varies

By firm size

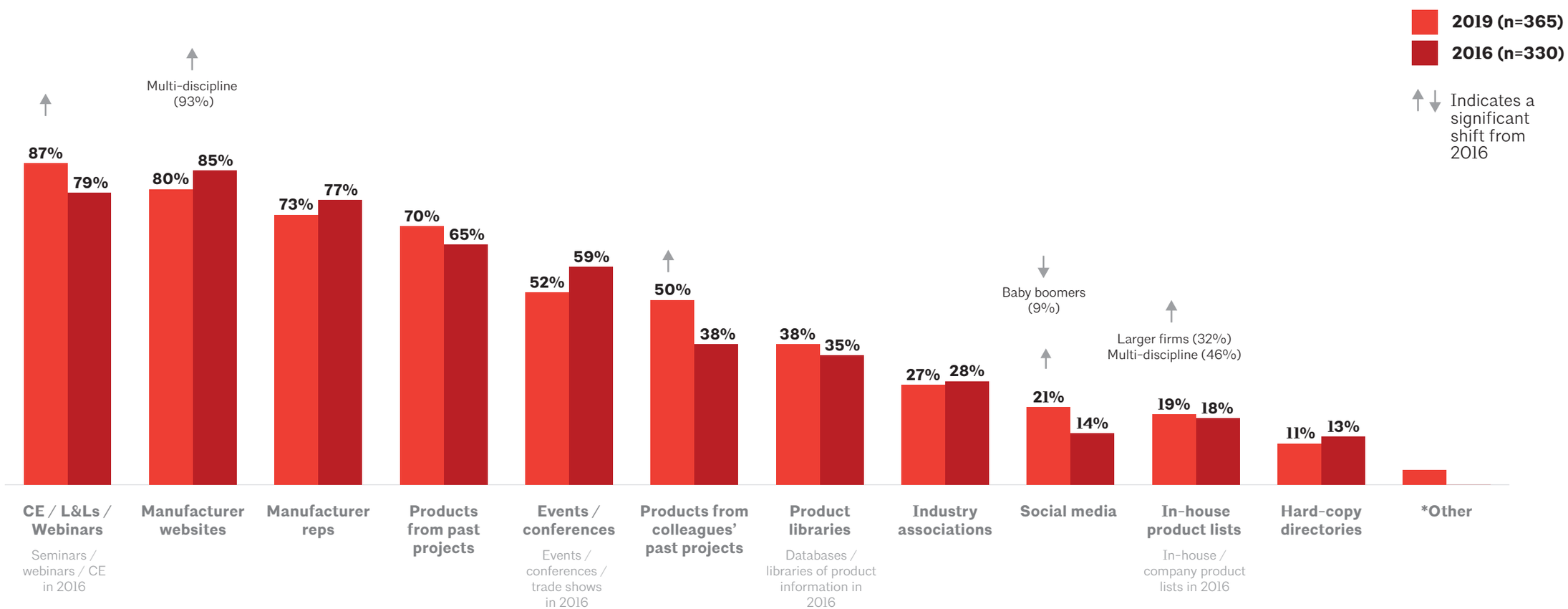
Q11. Thinking generally, who are your key influencers in terms of learning about products/materials?

Top sources of information

CE and social media are growing sources for learning about new products

Continuing Education (CE) and social media is being used more for product research than in 2016.

Architects are also more inspired by what colleagues are specifying. This might be due to the growth of specification.



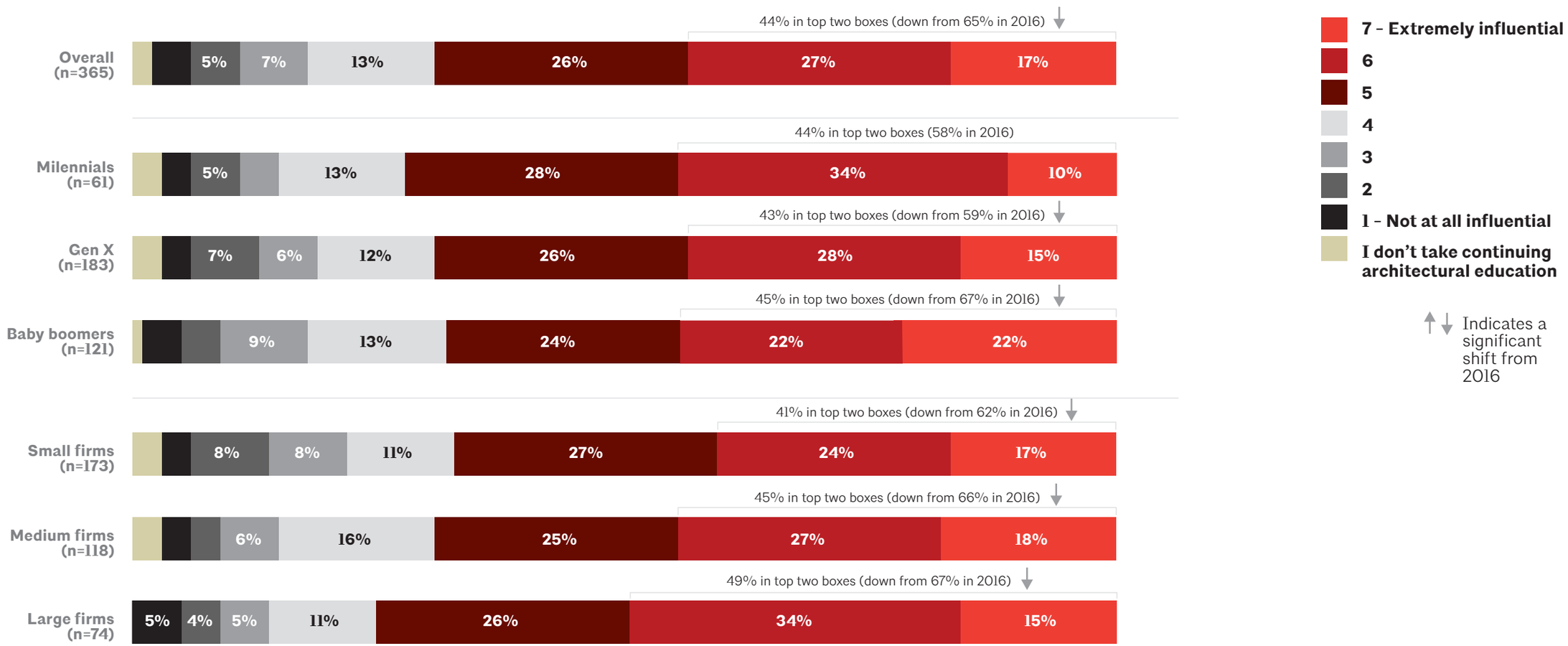
Base: 365
All respondents

Q12. Which of the following sources of information do you use in general to keep on top of trends relating to products/materials?

The impact of continuing education

CE is less useful for learning about manufacturers; which shows that they work

Despite now being a top source for architects to learn about products, CE is considered less influential for learning about specific BPMs. This may be a reflection of the positive impact of CE in introducing manufacturers to architects. Since CE is often sponsored by well-known manufacturers, architects may have gotten to know those brands well over the years through CE, thus reducing their continued impact of raising awareness among architects.



Base: Varies
All respondents

Q13. How influential is your continuing architectural education in terms of your knowledge of specific building product manufacturers (BPMs)? Please use a scale from 1 to 7, where 1 means 'not at all influential' and 7 means 'extremely influential'

Chapter 5
The journey to specification

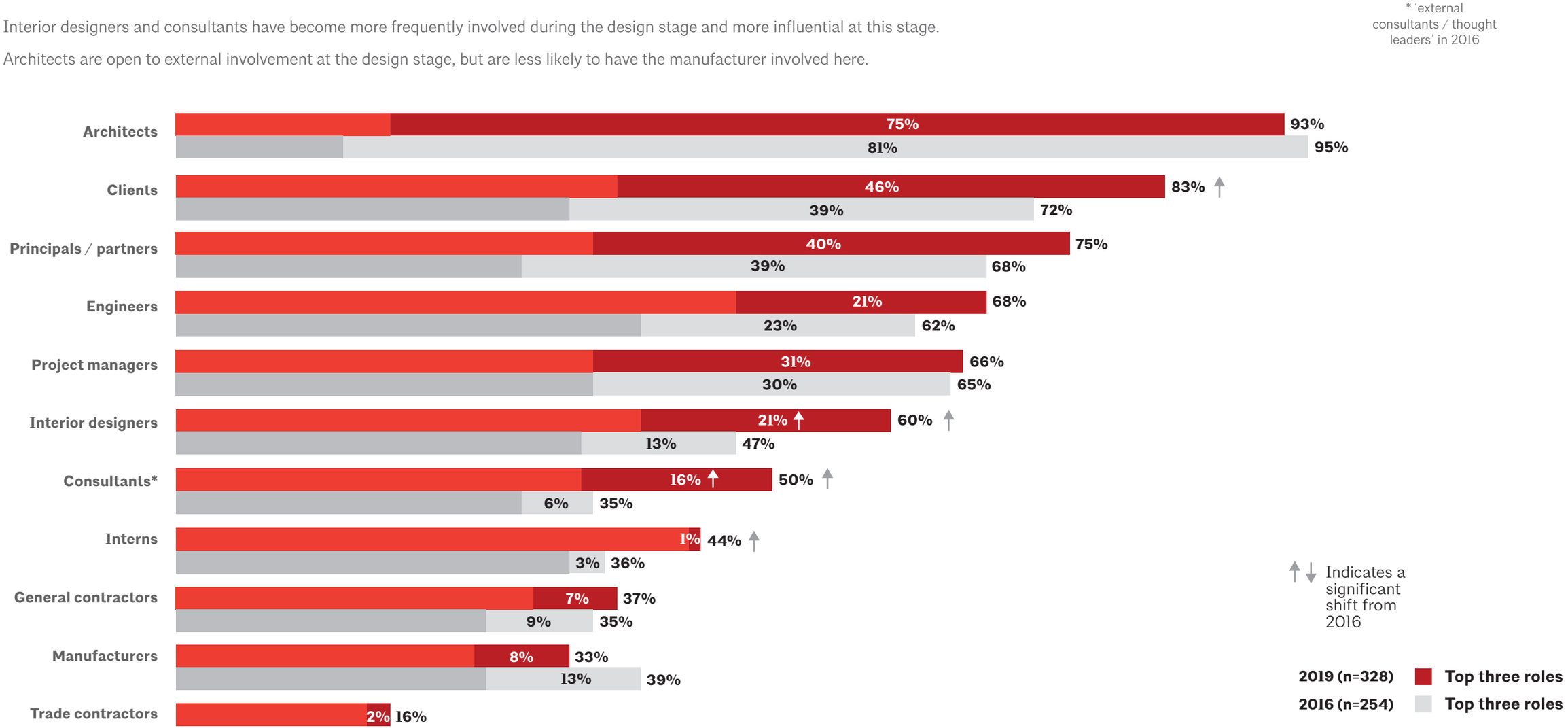
The design stage

Involvement in the design stage

Sources outside the studio are growing in influence, but not manufacturers

Interior designers and consultants have become more frequently involved during the design stage and more influential at this stage.

Architects are open to external involvement at the design stage, but are less likely to have the manufacturer involved here.



Base: Varies
By wave

Q16. Including your role, which of the following are involved at any time during the design stage of a typical project?
Q17. Please select the top 3 roles during the design stage of a typical project, according to how much influence they have over specification decisions.
* 'external consultants / thought leaders' in 2016

Involvement in the design stage

Larger firms collaborate more on design than smaller firms

Larger firms have significantly more roles for involved in the design stage of a typical project, including; engineers, project managers, interior designers, and interns. Differences are mostly driven by firm size.

		FIRM SIZE			PROJECT FOCUS		FIRM TYPE		
	Overall	Small (1-19)	Medium (20-99)	Large (100+)	Mostly larger buildings	Mostly single family residential	Single-disciplinary architecture	Multi-disciplinary	Non-core
BASE	**329**	**152**	**109**	**68**	**131**	**42**	**93**	**190**	**46**
Architects	93%	89%	96%	97%	92%	86%	85%	98%	91%
Clients	83%	80%	83%	90%	78%	88%	83%	83%	80%
Principals / partners	75%	70%	83%	74%	73%	69%	73%	77%	70%
Engineers	68%	62%	69%	81%	66%	64%	65%	72%	59%
Project managers	66%	50%	73%	88%	67%	26%	49%	73%	70%
Interior designers	60%	43%	70%	81%	56%	43%	34%	77%	39%
Consultants	50%	47%	50%	57%	53%	38%	46%	48%	65%
Interns	44%	36%	46%	57%	46%	19%	35%	49%	39%
General contractors	37%	38%	38%	34%	37%	40%	38%	36%	37%
Manufacturers	33%	28%	38%	38%	39%	26%	31%	35%	30%
Trade contractors	16%	16%	19%	12%	23%	14%	17%	15%	20%
Other	3%	2%	2%	6%	3%	0%	1%	3%	4%

Sig. higher
Sig. lower

Base: Varies
By firm size/project focus

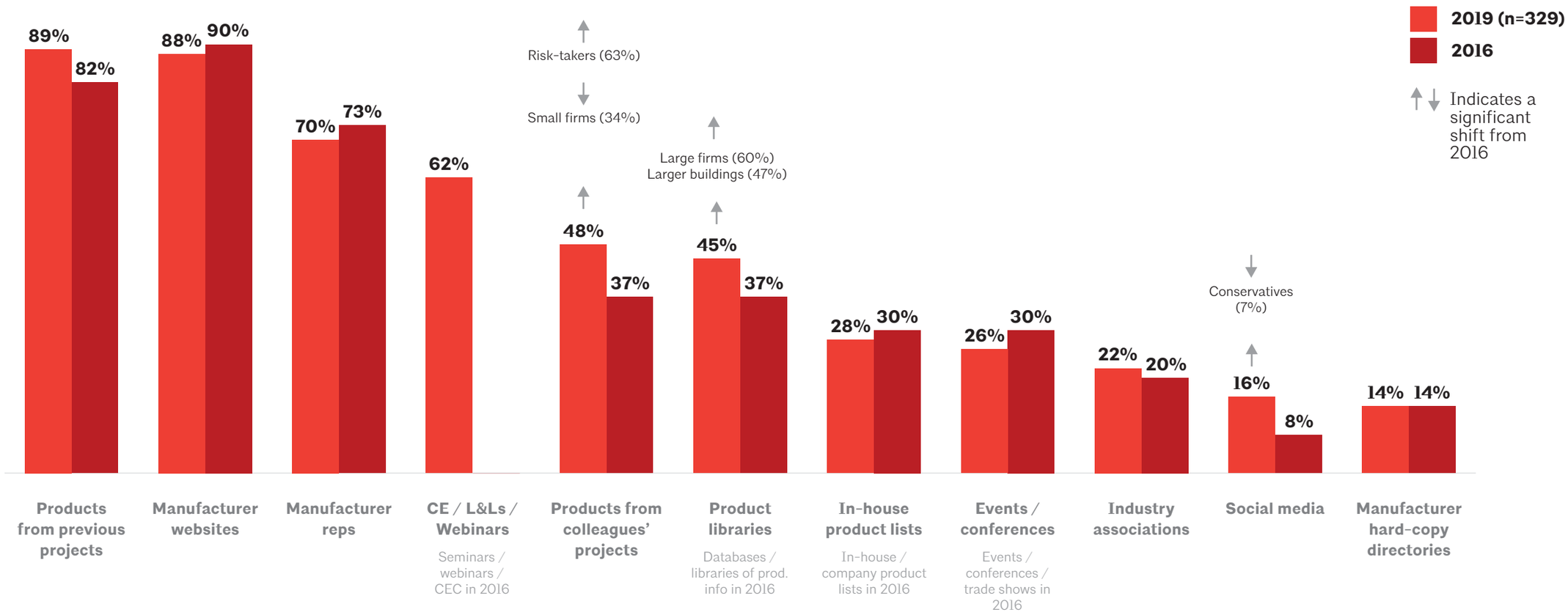
Q16. Including your role, which of the following are involved at any time during the design stage of a typical project?

Information sought during the design phase

Previous projects and manufacturer websites remain top information sources

Previous projects and manufacturer websites remain the most common sources of information for architects during the design phase.

Though still a lesser used source, twice as many architects are using social media as in 2016. Product libraries are also growing in importance.



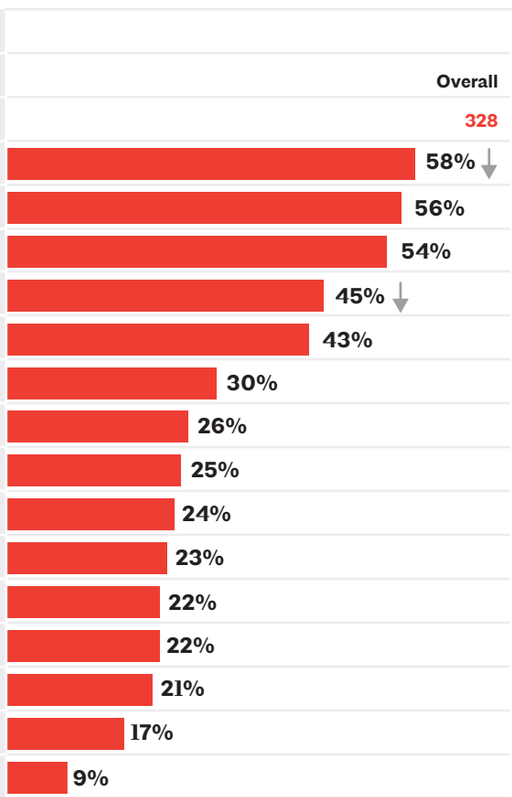
Base: 329
All respondents involved in design stage

Q19. Which of the following sources of information do you use during the design stage of a typical project?

Information sought during the design phase

Younger architects rely less on technical product descriptions

Architects rely less on product specs and technical product descriptions, perhaps because these sources are not as important to younger specifiers; and because the information is collected elsewhere like specification software, internal product libraries and products from colleagues' projects.



			AGE			PERSONA		
	Overall	2016	Millennial	Gen X	Baby boomer	Conservative	Dynamist	Risk taker
BASE	328	254	54	170	104	118	114	96
Technical product descriptions	58% ↓	67%	28%	55%	80%	74%	49%	50%
Pricing information	56%	60%	52%	59%	54%	55%	58%	55%
Design guides	54%	54%	43%	56%	58%	49%	61%	52%
Product specifications	45% ↓	59%	33%	46%	51%	46%	44%	47%
CAD / BIM models*	43%	48%	65%	50%	20%	33%	59%	36%
Media	30%	27%	50%	33%	15%	20%	36%	35%
Environmental ratings**	26%	31%	20%	24%	31%	13%	18%	50%
Lead-times / availability	25%	N/A	35%	23%	24%	26%	27%	22%
Contact information	24%	26%	22%	22%	30%	31%	23%	19%
Industry trends	23%	18%	24%	19%	28%	23%	22%	23%
Installation instructions	22%	20%	28%	22%	17%	25%	17%	23%
Case studies	22%	20%	31%	19%	20%	20%	21%	24%
Online tools	21%	N/A	24%	22%	18%	19%	25%	20%
Warranty information	17%	21%	17%	14%	24%	19%	12%	21%
Production locations	9%	N/A	7%	9%	11%	11%	8%	9%

↑↓ Indicates a significant shift from 2016

Sig. higher

Sig. lower

Base: Varies
All respondents

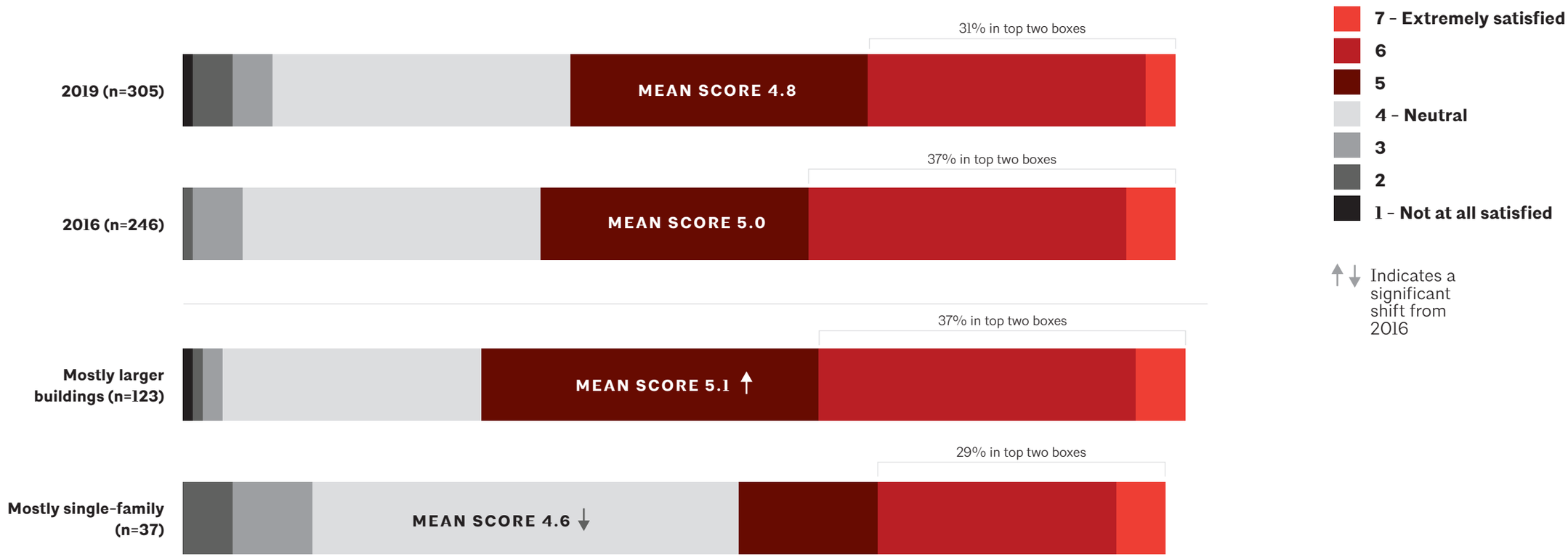
Q20. Which of the following types of product-related information do you seek during the design stage of a typical project?
*Separate options in 2016, ** 'environmental product ratings' in 2016

Satisfaction with manufacturers at the design stage

Satisfaction remains average, likely due to limited influence of manufacturers

Satisfaction with manufacturers at the design stage has declined slightly since 2016, reflecting their slightly more limited influence at this stage.

Architects who focus on larger buildings are more satisfied; likely because they use them more frequently at this stage.



Base: Varies

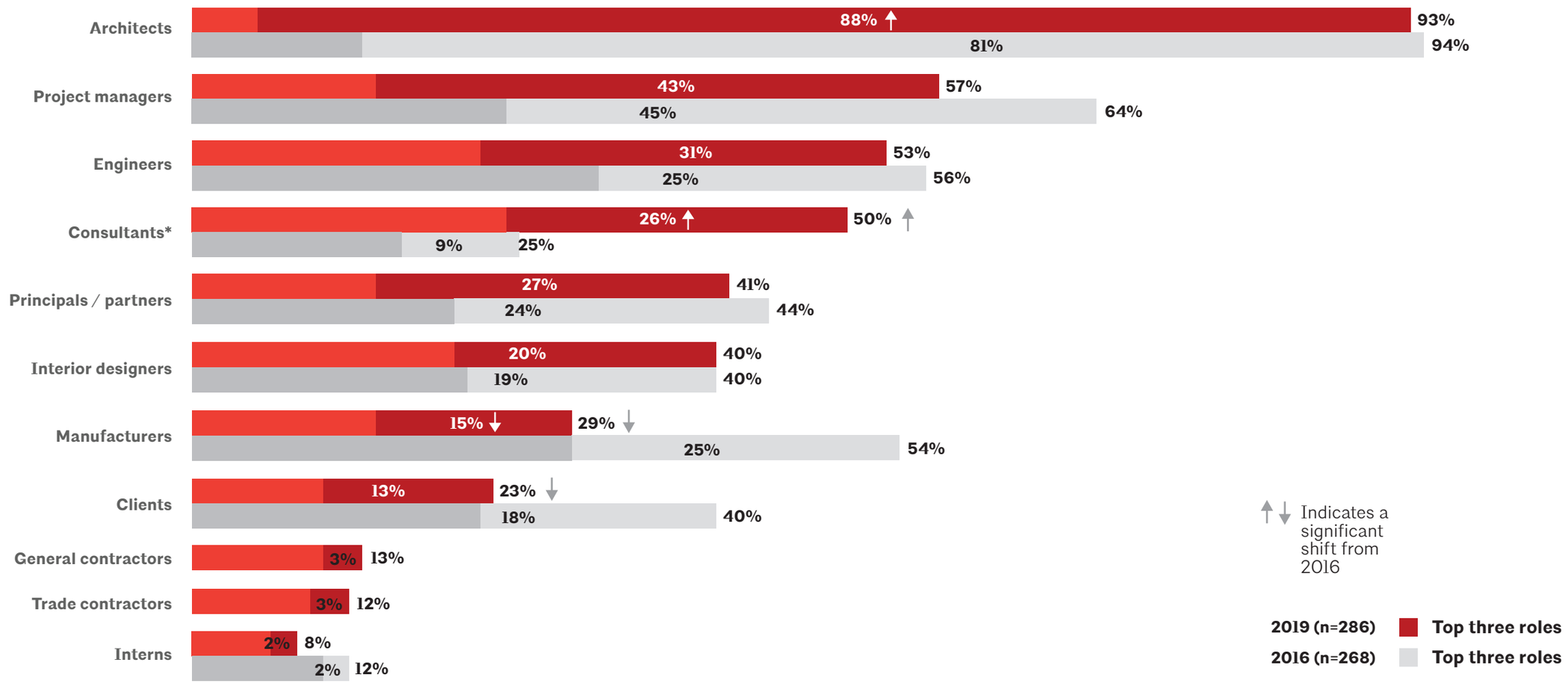
By wave/project focus Q18. How satisfied are you with Building Product Manufacturers (BPMs) in terms of meeting your needs at this stage of a project?

The specification stage

Involvement in product selection and writing specs

Consultants are becoming more involved in specification; manufacturers less so

Usage of consultants during the specification stage has increased significantly since 2016, while there has been a sharp decline in the role that manufacturers play. Many manufacturers are not keeping up with changing architect expectations, while cumbersome websites and lack of responsiveness continue to drive dissatisfaction at the specification stage.



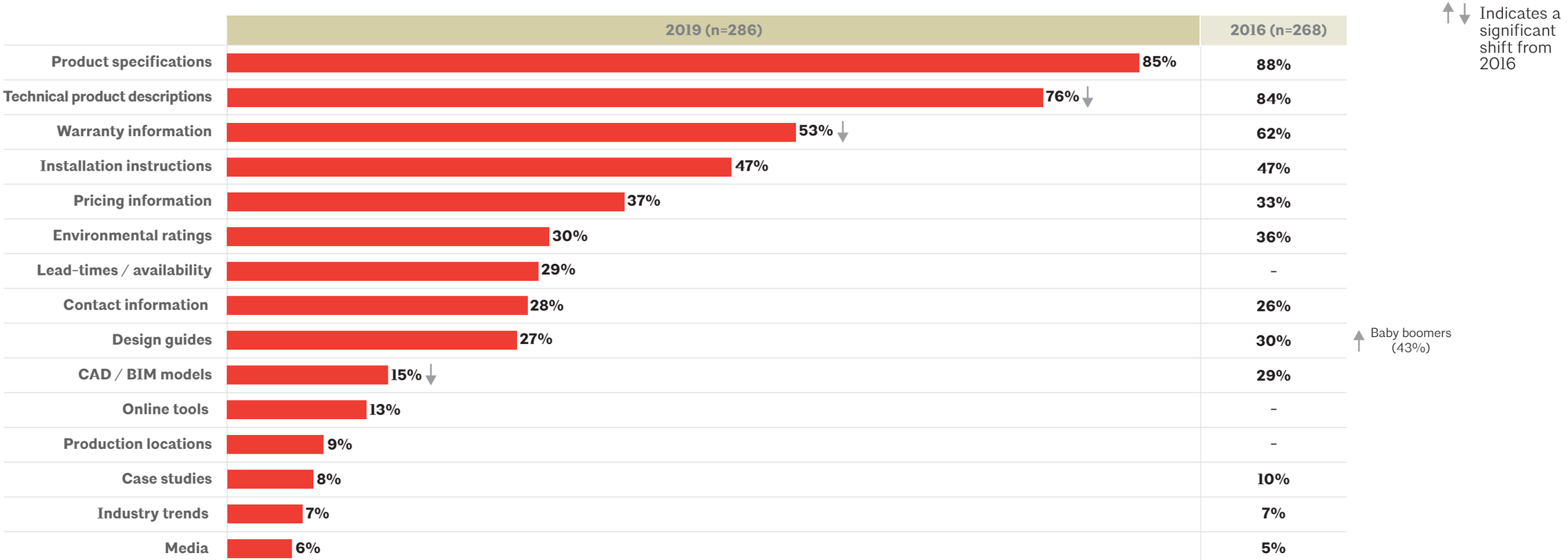
Base: Varies
By wave

Q21.Including your role, which of the following are involved in selection products and writing specifications on a typical project?
Q22.Please select the top 3 roles during the specification stage of a typical project, according to how much influence they have over specification decisions.

Information sought in the specification stage

Descriptions and specifications remain the top sources

Naturally, product specifications are the most important form of product information when it comes to the specification stage for a typical project. Usage of technical product descriptions and warranty information has decreased since 2016.



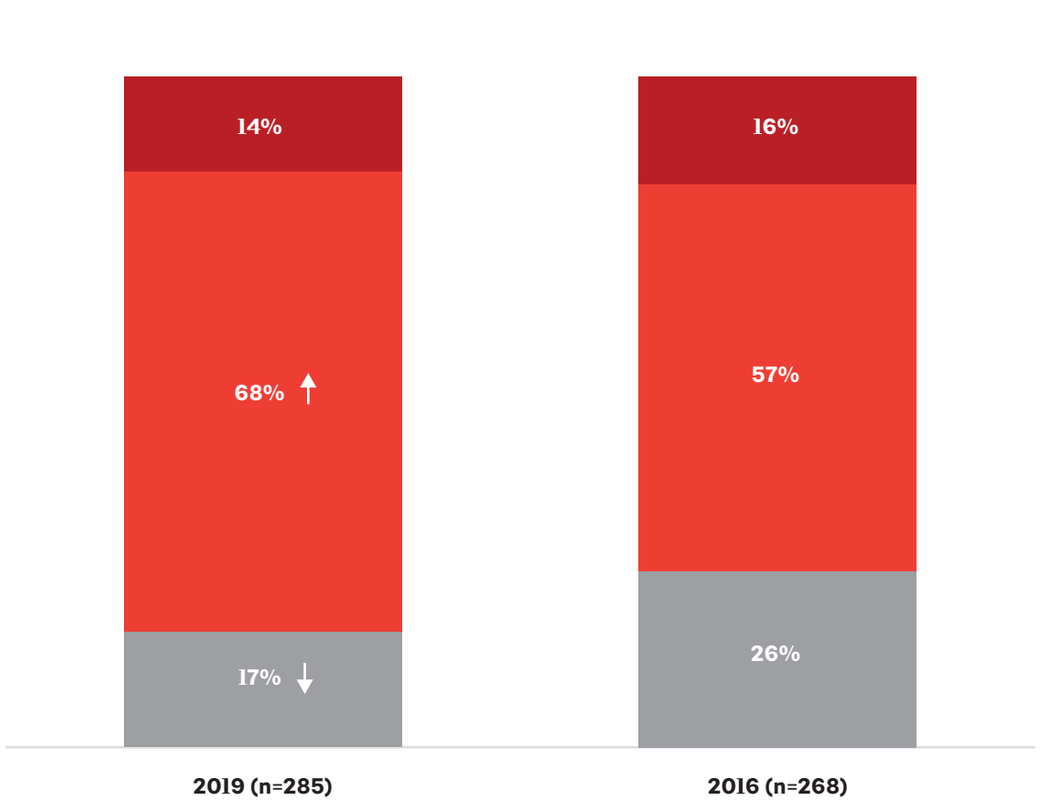
Base: 286
All respondents

Q25. which of the following types of product related information do you seek during the specification stage of a typical project?

Writing specifications

More architects copy and paste now than in 2016

Architects are more inclined to copy and paste content from previous specs now than 3 years ago. Copying and pasting specs is more common among millennial architects (75%), so this could reflect a trend away from writing specifications from scratch.



Base: Varies
By wave

Q26. When it comes to writing new product specifications, which of these statements best fits your working method?

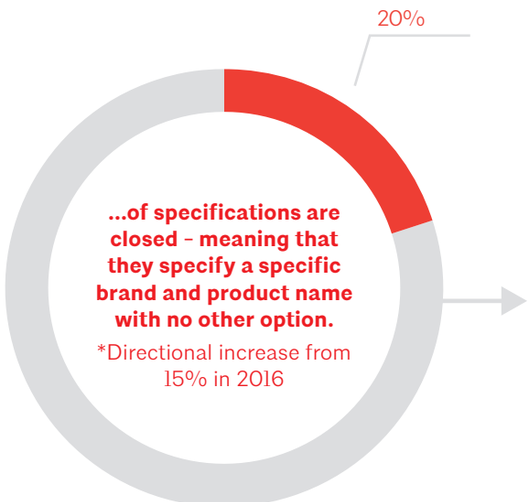
Detail included in specifications

Architects continue to specify manufacturer brand

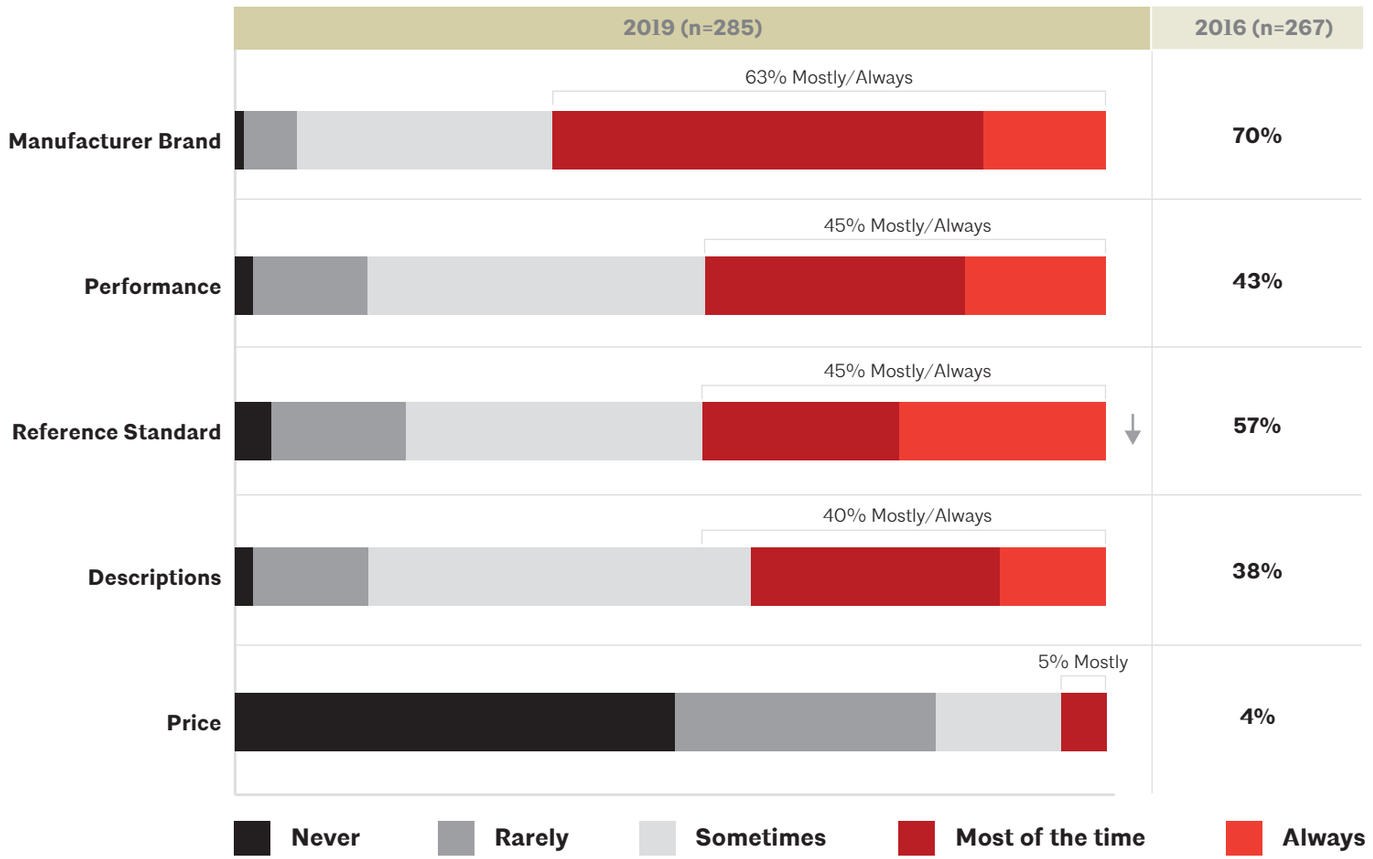
Named manufacturer brands remain at the heart of architect specification. Even when the specs are not closed, brand is usually specified.

Architects are less likely to specify a reference standard than in 2016.

Closed specs



When specifications are not closed, architects specify...



Base: 286
All respondents

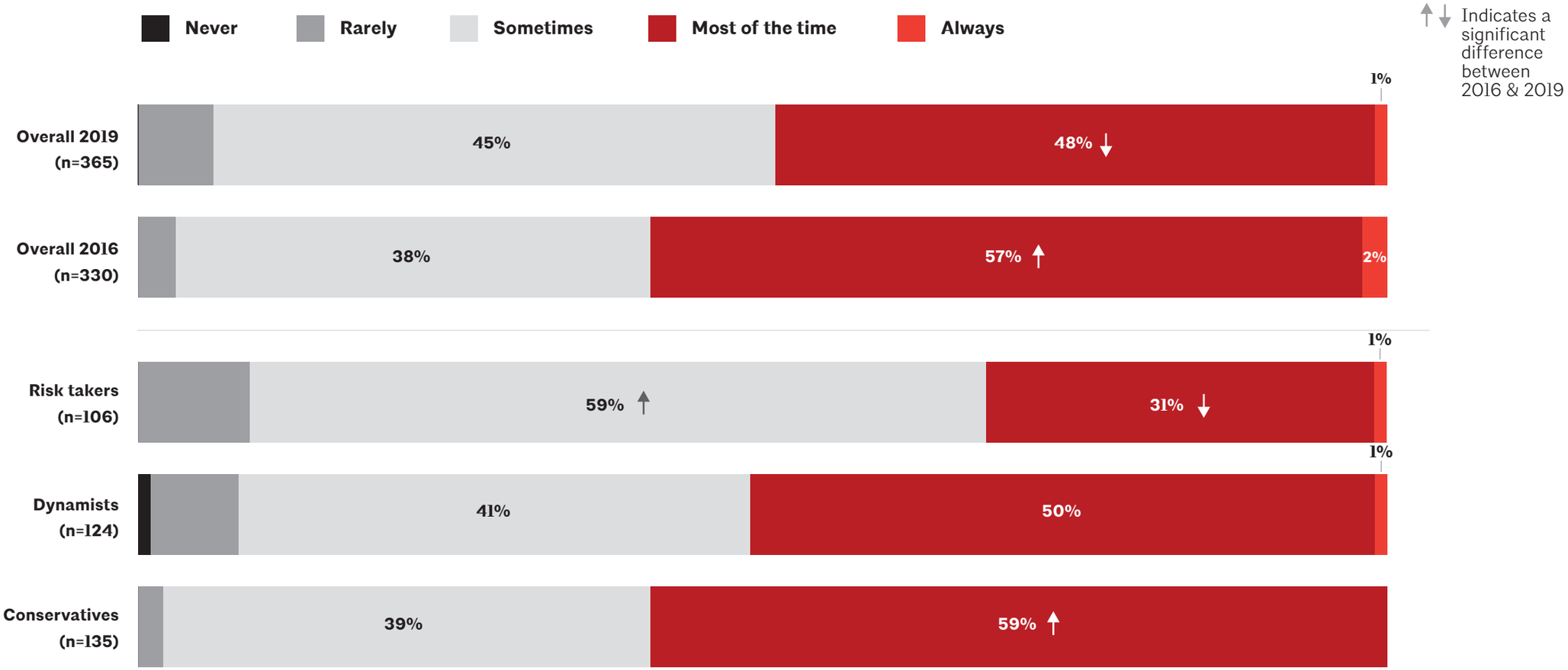
Q27. What percentage of all the building products/materials you select for a typical project are closed specifications (i.e., a specific brand and product name with no other option)?
Q28. When you don't make closed specifications, how often do you specify the following?

How often is a manufacturer specified without research?

Architects are more open to change but mostly specify what they know

About half of the time, architects know which manufacturers they will specify before conducting thorough research; although this is a significant drop from 2016. Architects have grown more experimental since 2016 and are more likely to research brands before specifying.

When architects do know the specified manufacturer beforehand, it is likely due to a past relationship with that manufacturer, as well as the manufacturer being an industry-leader able to meet a wide-range of needs in the product category.



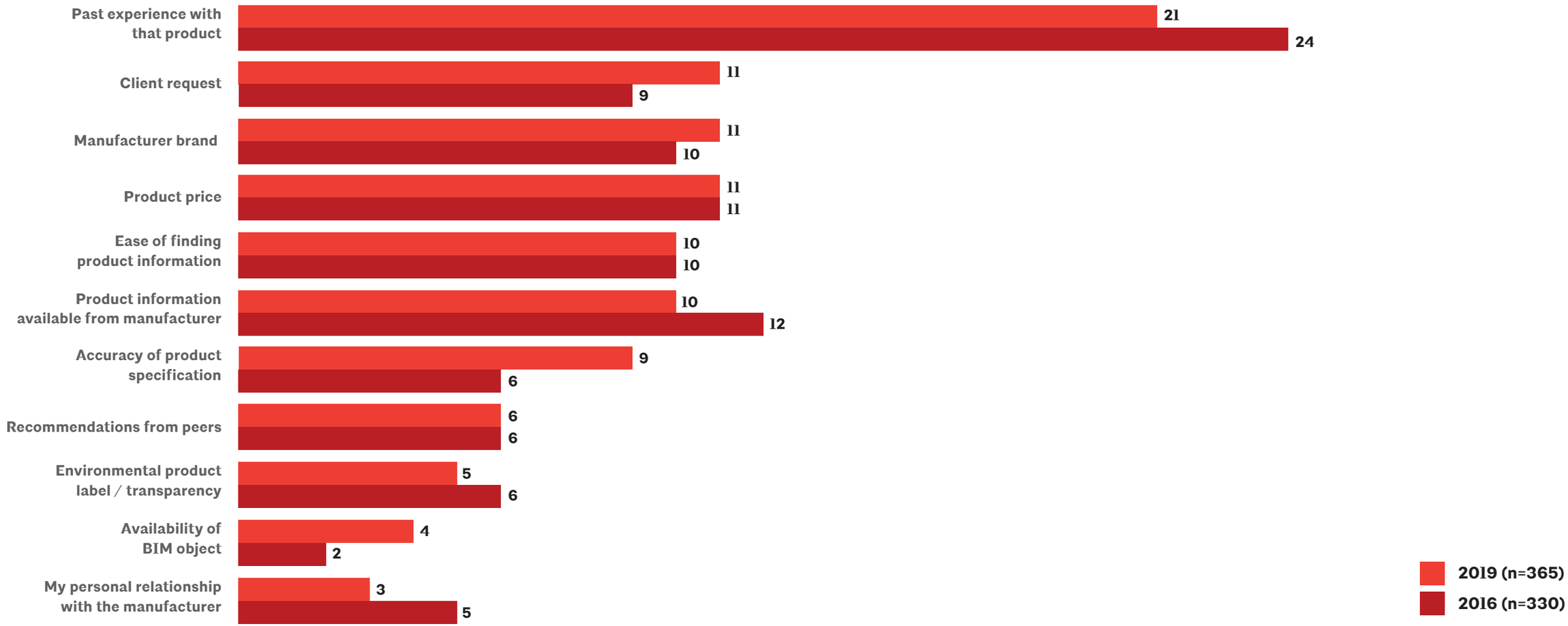
Base: Varies
By wave / persona

Q14. How often do you know which manufacturer(s) you will specify for a job before conducting thorough research (in other words, using your experience and existing knowledge to make decisions)?

Factors influencing specification

Decision making criteria is very consistent; past experience with product still vital

Past experience continues to play the biggest role when deciding between products / manufacturers. Even though architects have become more experimental, their past experience still carries the most weight. This is partly due to; liability concerns with untried products, limited time to research new products, trust/relationships with manufacturers built up over time and office masters/standards.



Base: Varies
By wave

Q15. Please indicate how important each factor is by allowing a total of 100 points.

Factors influencing specification

By persona

		PERSONA		
	All firms	Conservatives	Dynamist	Risk taker
BASE	**365**	**173**	**118**	**74**
Past experience with that product	23	28	20	20
Client request	16	15	18	15
Accuracy of product specification	16	17	15	15
Product price	15	16	15	16
Manufacturer brand	15	15	14	14
Product information available from manufacturer	14	13	15	15
Ease of finding product information	14	13	15	14
Recommendations from peers	11	10	12	12
Environmental product label	11	8	8	15
Availability of BIM object	10	6	12	10
Personal relationship with the manufacturer	9	10	9	9

Sig. higher
Sig. lower

Base: Varies
By persona

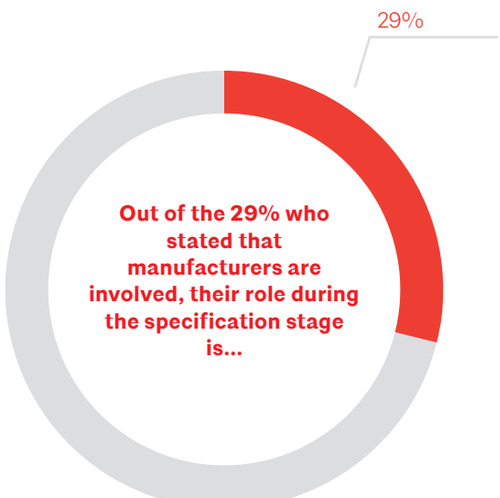
Q15. Please indicate how important each factor is by allowing a total of 100 points.

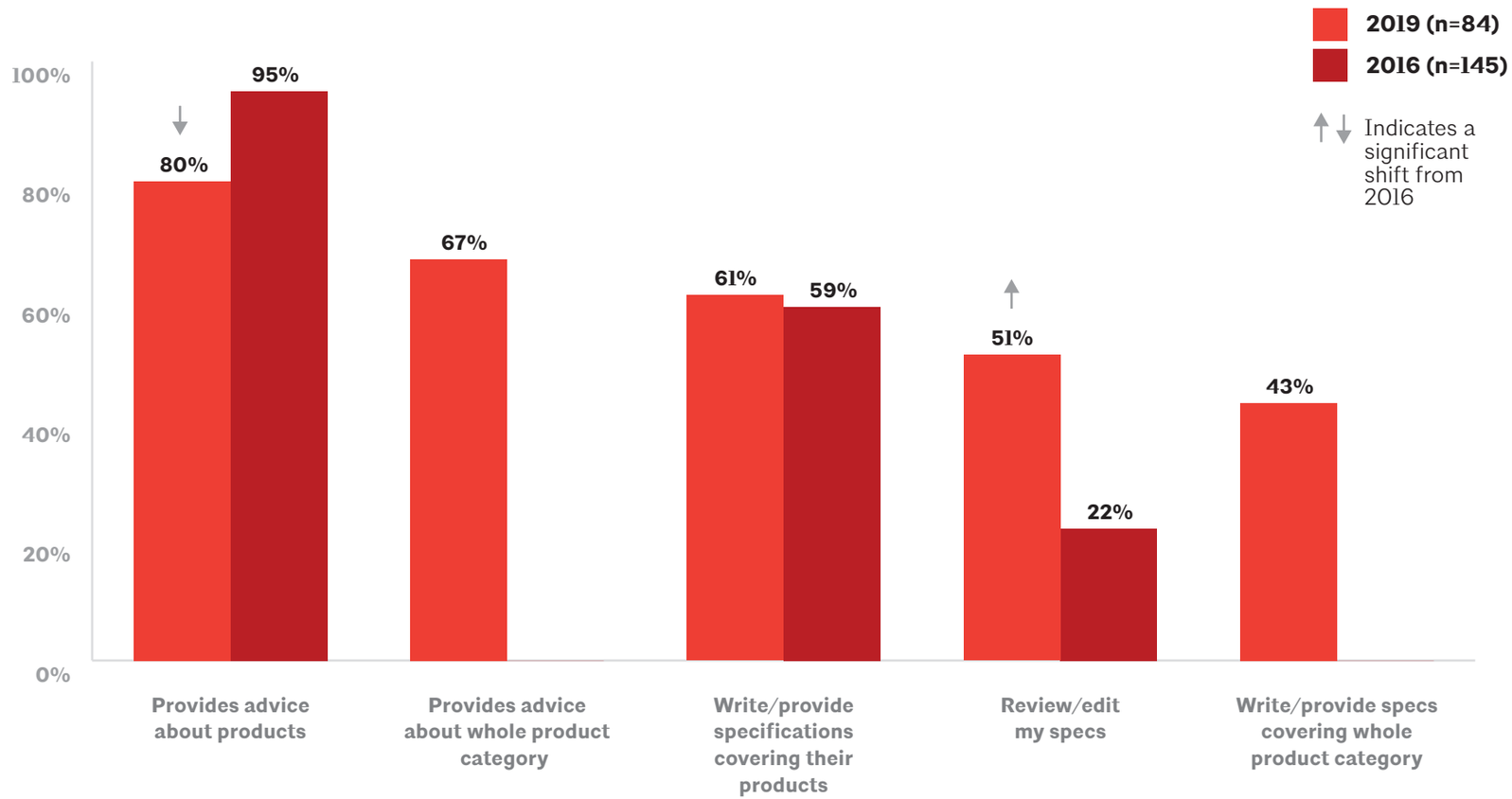
Role of the manufacturer during the specification stage

Architects are looking for manufacturers to support specification more

Architects that involve manufacturers at this stage expect them to actively edit or review specs rather than just providing advice.

Failure of manufacturers to live up to these heightened expectations may be driving architects to look to other sources for support.





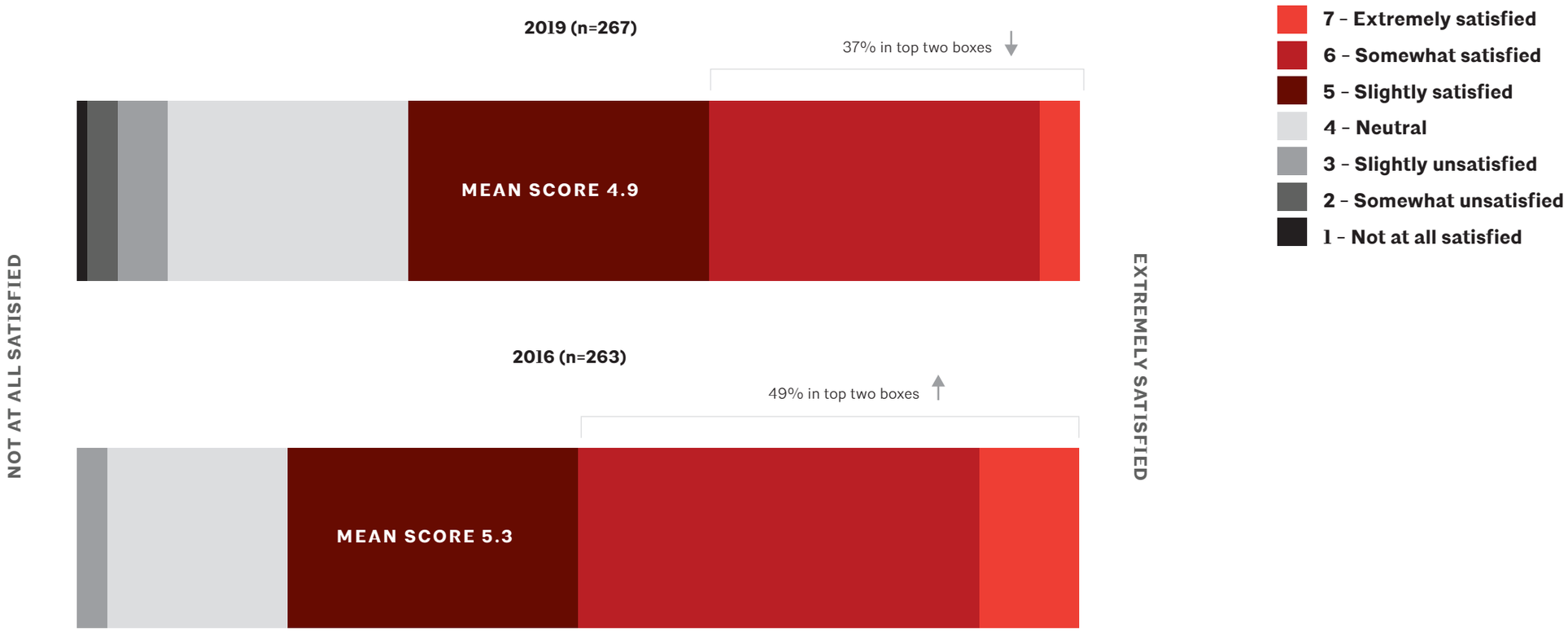
Base: Varies
By wave

Q23. What is the role of the building product manufacturer (BPM) during the specification stage of a typical project?

Satisfaction with manufacturers at the specification stage

Satisfaction with manufacturers has significantly decreased

Architects are significantly less satisfied with manufacturers at the specification stage. This is driven in large part by underperformance on websites, rep responsiveness and lack of support with specification (e.g. editing/reviewing specs). These are most acutely felt in the specification stage.



Base: Varies
By wave

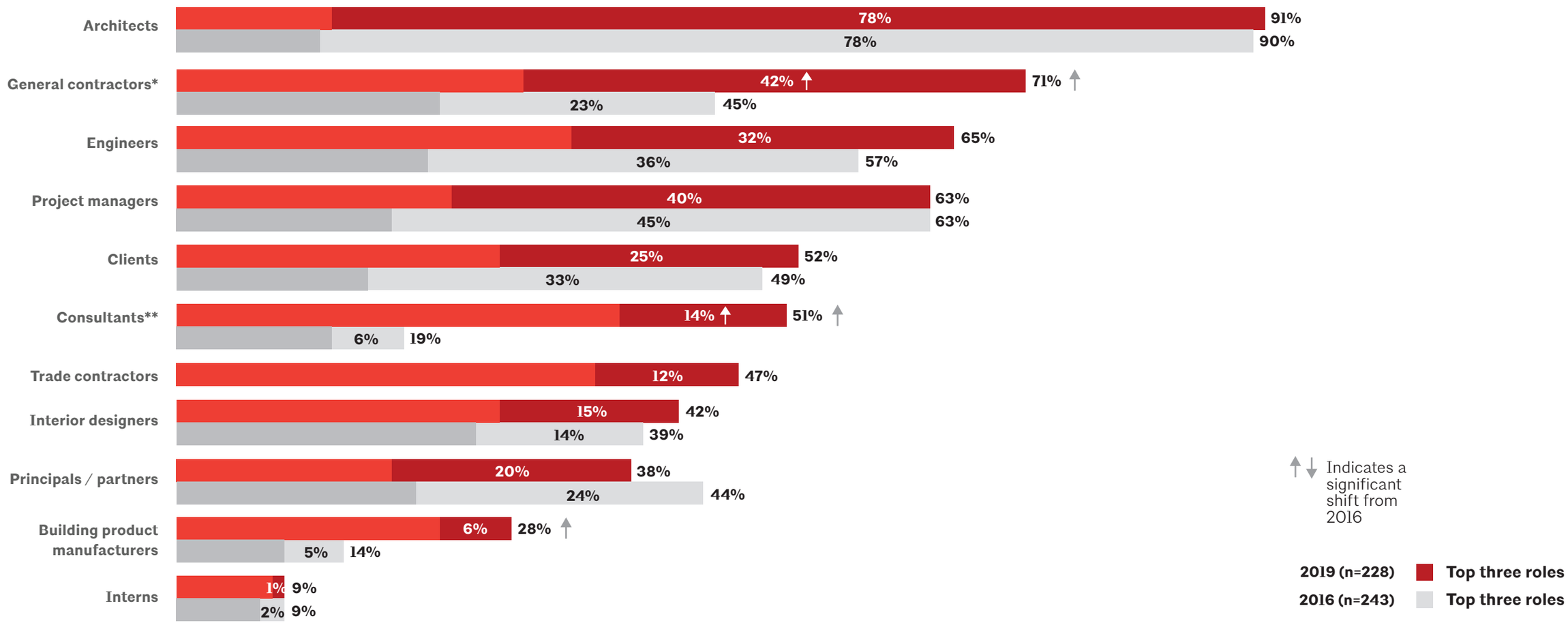
Q24. How satisfied are you with BPMs in terms of meeting your needs at this stage of a project?
Please use a scale from 1 to 7, where 1 means 'not at all satisfied' and 7 means 'extremely satisfied'.

The post-specification stage

Involvement in the post specification stage

BPMs are more often involved, while GC and consultant influence is growing

Contractor and consultant involvement has significantly increased since 2016; possibly as a result of the integrated project management and design-build trends in the construction market. Over a quarter of architects now involve manufacturers in the in the post-specification stage, compared to only 14% in 2016. This is encouraging, as there was appetite for greater manufacturer involvement in 2016. However, influence remains more limited.



Base: Varies
By wave

Q32. Including your role, which of the following are involved at any time during the post-specification stage of a typical project?
Q33. Please select the top 3 roles during the post-specification stage of a typical project, according to how much influence they have over specification decisions.
** Single contractors option in 2016, * 'external consultants / thought leaders' in 2016

Involvement in the post specification stage

Firm size determines who manages the post-specification stage

		FIRM SIZE		
	Overall	**Small (1-19)**	**Medium (20-99)**	**Large (100+)**
BASE	**228**	**104**	**72**	**52**
Architects	91%	86%	93%	100%
General contractors*	71%	70%	75%	69%
Engineers	65%	59%	71%	69%
Project managers	63%	59%	65%	67%
Clients	52%	55%	53%	44%
Consultants**	51%	49%	46%	63%
Trade contractors	47%	43%	47%	54%
Interior designers	42%	31%	44%	60%
Principals / partners	38%	50%	38%	15%
Manufacturers	28%	32%	24%	25%
Interns	9%	9%	8%	12%

Sig. higher
Sig. lower

Base: Varies
By firm size

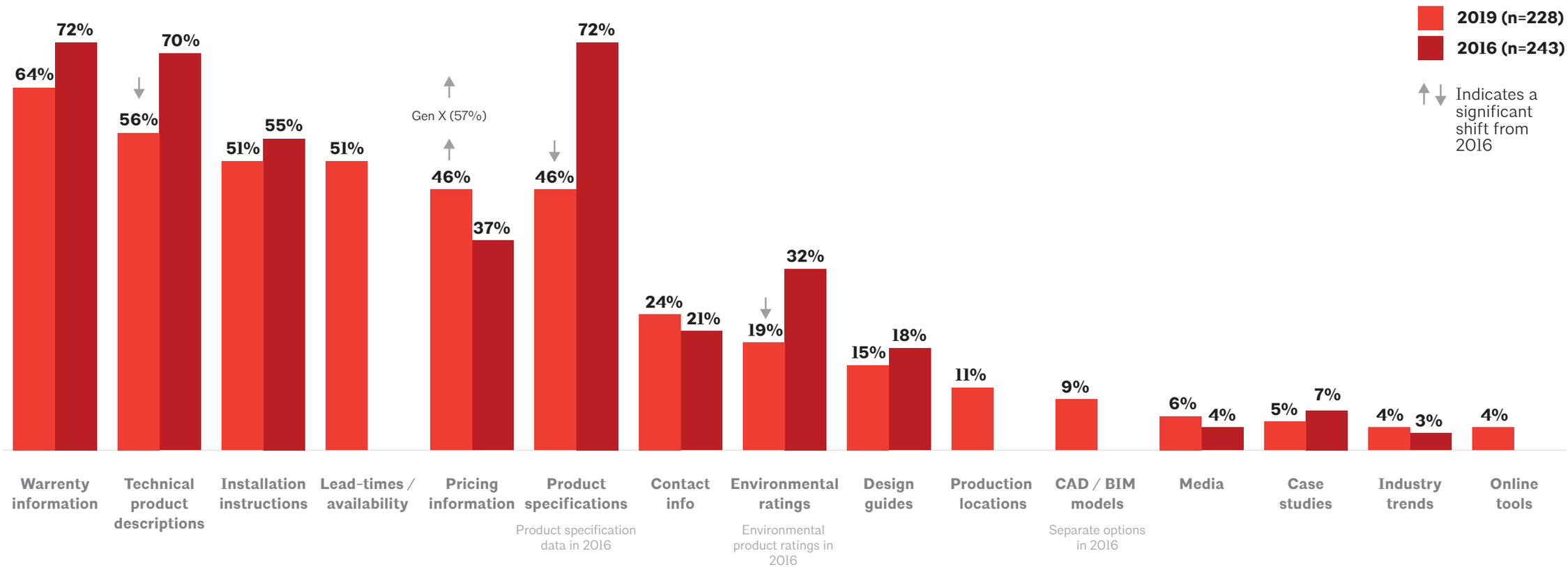
Q32. Including your role, which of the following are involved at any time during the post-specification stage of a typical project?
* 'external consultants / thought leaders' in 2016, ** Single contractors option in 2016

Information sought in the post specification stage

Warranty information & technical product descriptions are the most sought after

Warranty information, technical product descriptions, installation instructions, and lead times / availability are the most sought out types of product-related information in the post-specification stage.

Significantly fewer search for technical product descriptions, product specifications, and environmental ratings, while more look for pricing information.

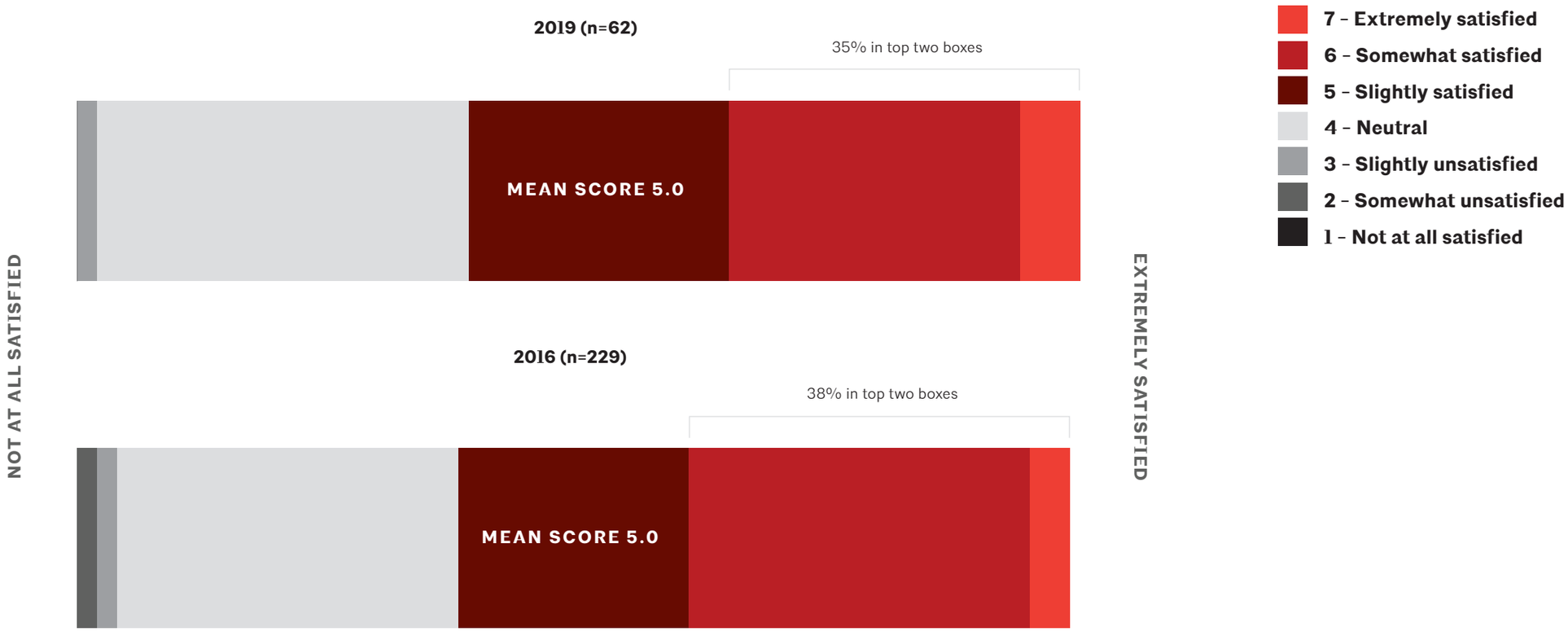


Base: Varies
By wave

Q35. Which of the following types of product-related information do you seek during the post specification stage of a typical project?

Satisfaction with manufacturers during post specification

Good satisfaction maintained since 2016



Base: Varies
By wave

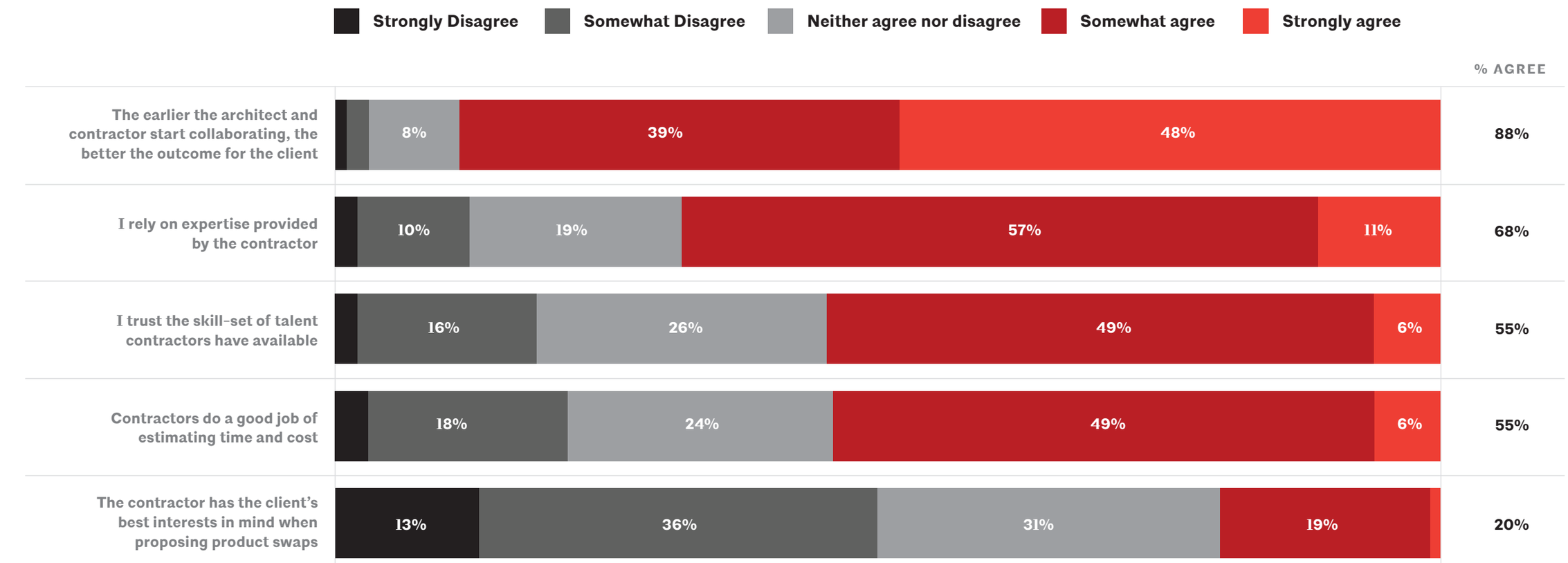
Q34. How satisfied are you with Building Product Manufacturers (BPMs) in terms of meeting your needs at this stage of a project?

Chapter 6
The architect-contractor relationship

Preferred role of the contractor in the process

Architects want early contractor collaboration but are skeptical about swaps

Nearly 90% of respondents agree that it is best when architects and contractors collaborate as early as possible on projects. Architects respect the expertise that contractors bring to the table and appreciate their input. However, they have some doubts about their motivation behind swap requests.



Base: 356
All respondents

Q29. How much do you agree with the following statements as it pertains to the average general contractor you work on a typical project with?

Preferred role of the contractor in the process

Younger architects are more likely to rely on contractor expertise

		AGE		
	Overall	Millennial	Gen X	Baby boomer
BASE	365	61	183	121
The earlier the architect and contractor start collaborating, the better	88%	89%	87%	88%
I rely on expertise provided by the contractor	68%	77%	72%	59%
I trust the skill-set of talent contractors have available	55%	52%	59%	51%
Contactors do a good job of estimating time / cost	55%	57%	54%	56%
The contractor has the client's best interests in mind when proposing swaps	20%	33%	20%	14%

Sig. higher
Sig. lower

Base: Varies
By Aae

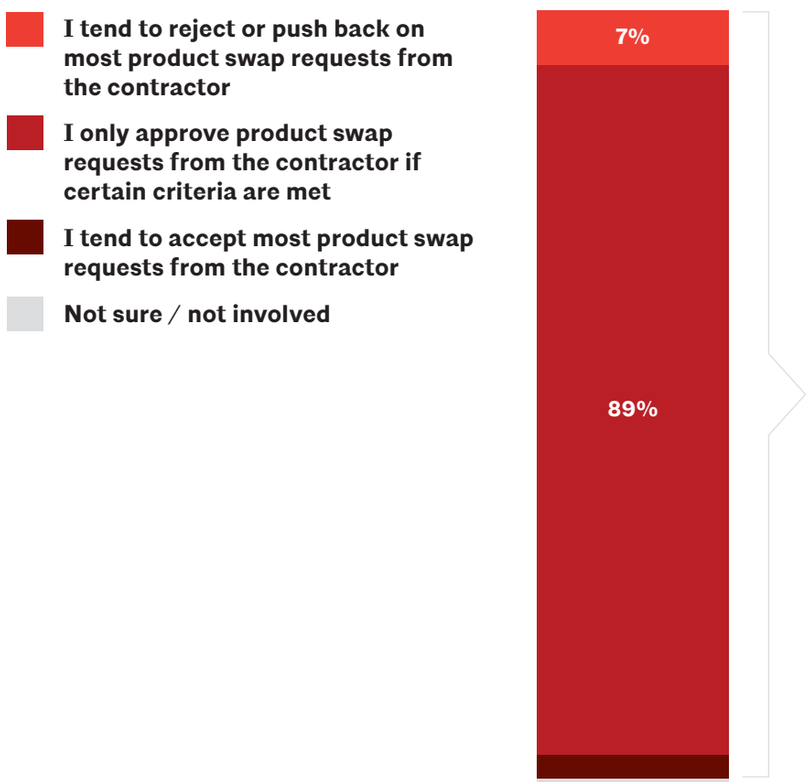
Q29. How much do you agree with the following statements as it pertains to the average general contractor you work on a typical project with?

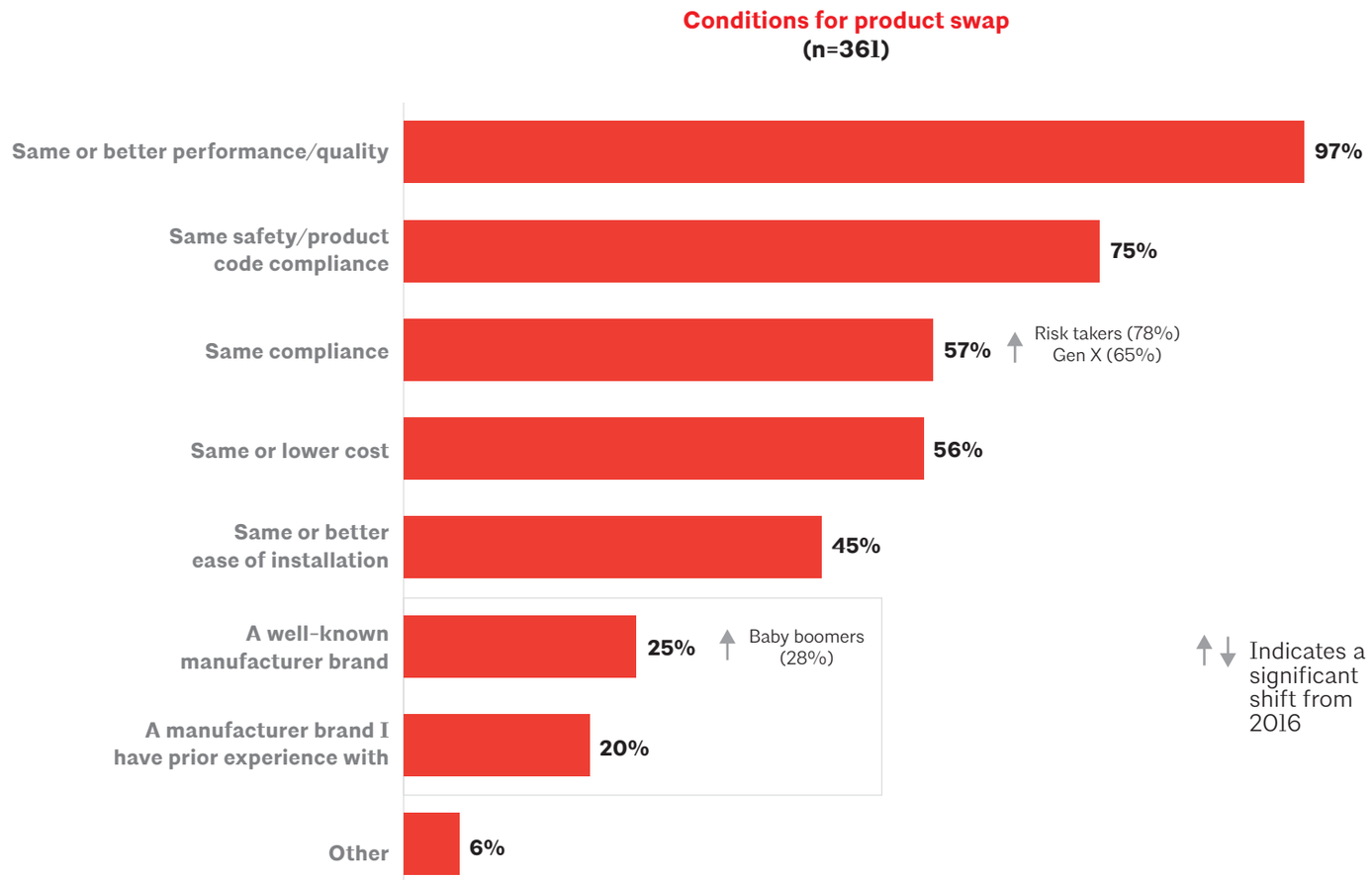
Architect response to product swaps

Product swaps must uphold criteria such as quality & code compliance

Architects scrutinize product swap requests from contractors, and ensure that substitutes meet performance and compliance requirements.

Architects are less focused on 'holding the brand' specified in general: proprietary AIA research has demonstrated this varies by product category.





Base: Varies
By All respondents

Q30. Thinking about a typical project, what is your likely response to a product swap request from a contractor? Q31. Imagine you receive a substitution request for a product have specified for a project. Which minimum conditions must be met for you to approve a substitution request?

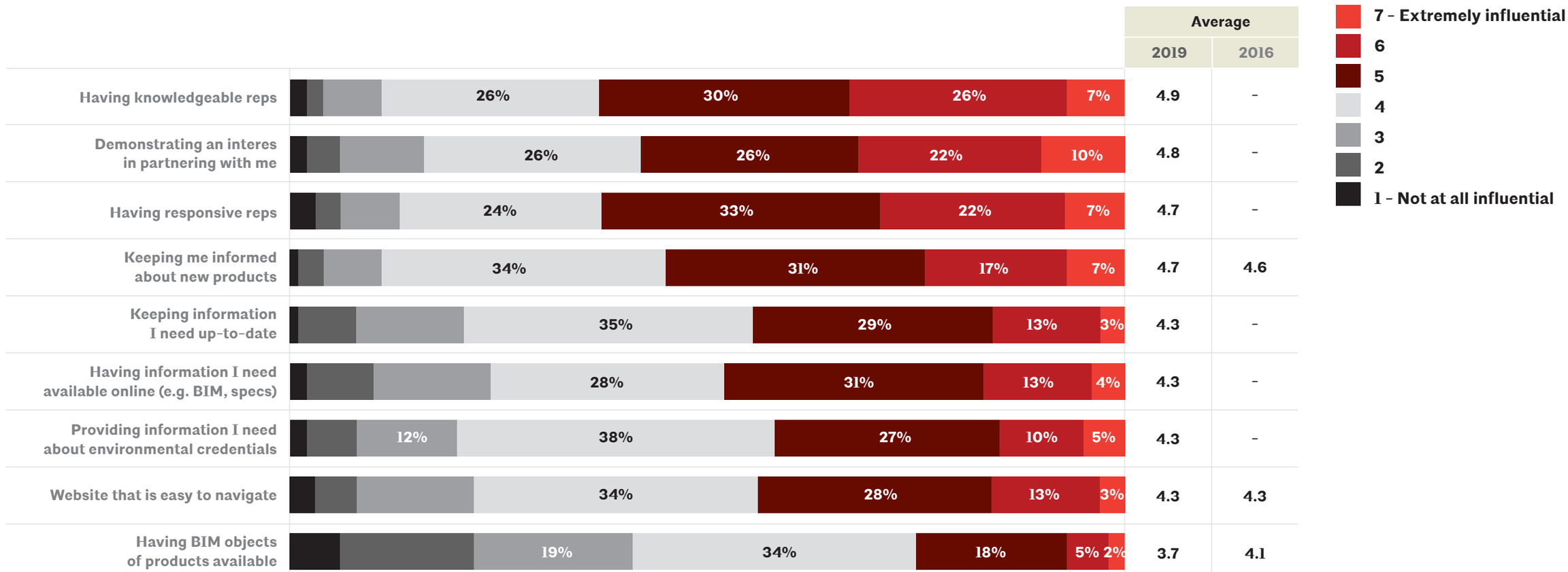
Chapter 7
Meeting the needs of architects

Satisfaction with manufacturers

Digital needs are still being underserved

BIM availability and website usability are areas of underperformance from manufacturers, who fall below the satisfaction threshold across the board.

The conservative persona is significantly less satisfied with manufacturers keeping them up to date on new products (4.5).



Base: 365
All respondents

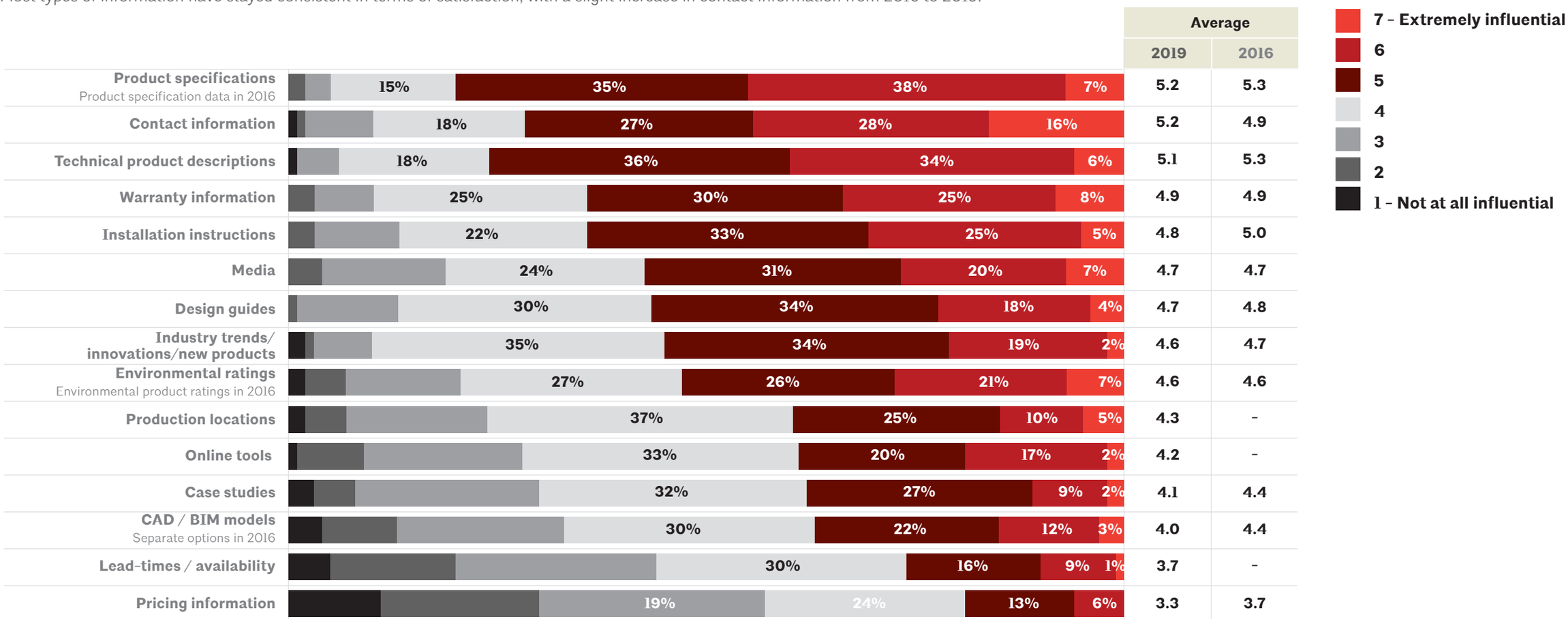
Q37. How satisfied are you with Building Product Manufacturers on each of the following attributes?

Satisfaction with information sources

Overall room for improvement with satisfaction; product specifications are strong

The top three types of information that architects are most satisfied with when provided by manufacturers are product specifications, contact information, and technical product descriptions. Product specifications and descriptions are used less because younger architects are less interested in them. It is important for manufacturers to offer quality media and CAD / BIM models to keep up with evolving architect needs.

Most types of information have stayed consistent in terms of satisfaction, with a slight increase in contact information from 2016 to 2019.



Base: 365
All respondents

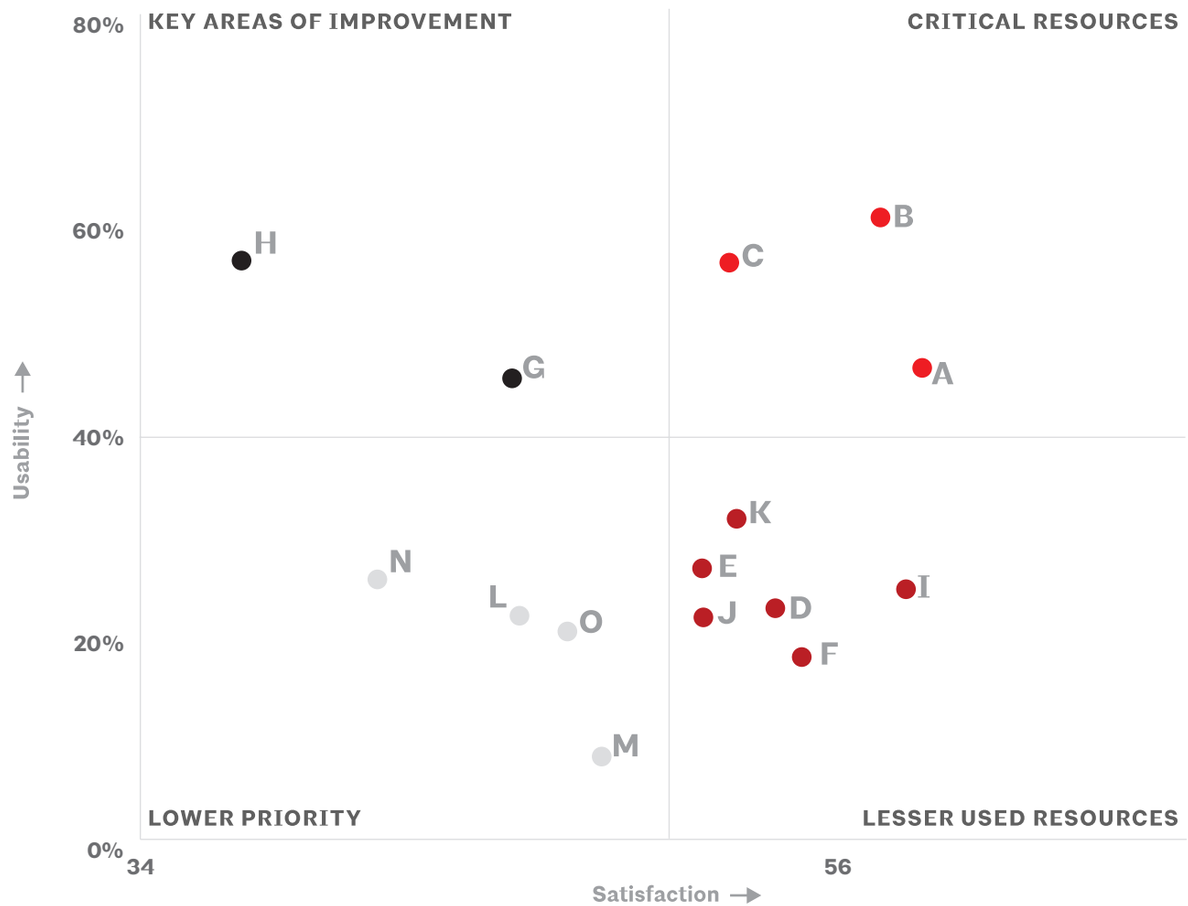
Q36. How satisfied are you with the quality of each of the following types of information provided by manufacturers?

Satisfaction & usage of information sources

Improvements for pricing information & BIM / CAD required

Satisfaction is strong with popular sources like product specifications and descriptions, but these sources are declining in importance.

Improvement is needed with CAD and BIM models as these are very popular among younger architects.



	Source
A	Product specification s
B	Technical product description s
C	Design guide s
D	Installation instructions
E	Environmental ratings (e.g. LEED)
F	Warranty information
G	CAD / BIM model s
H	Pricing informatio n
I	Contact information (for product queries)
J	Industry trends / innovations / new products
K	Media (e.g., photos, drawings, videos)
L	Case studies
M	Production locations
N	Lead-times / availability
O	Online tool s

Base: Varies

By design

Q20. Which of the following types of product-related information do you seek during the design stage of a typical project?

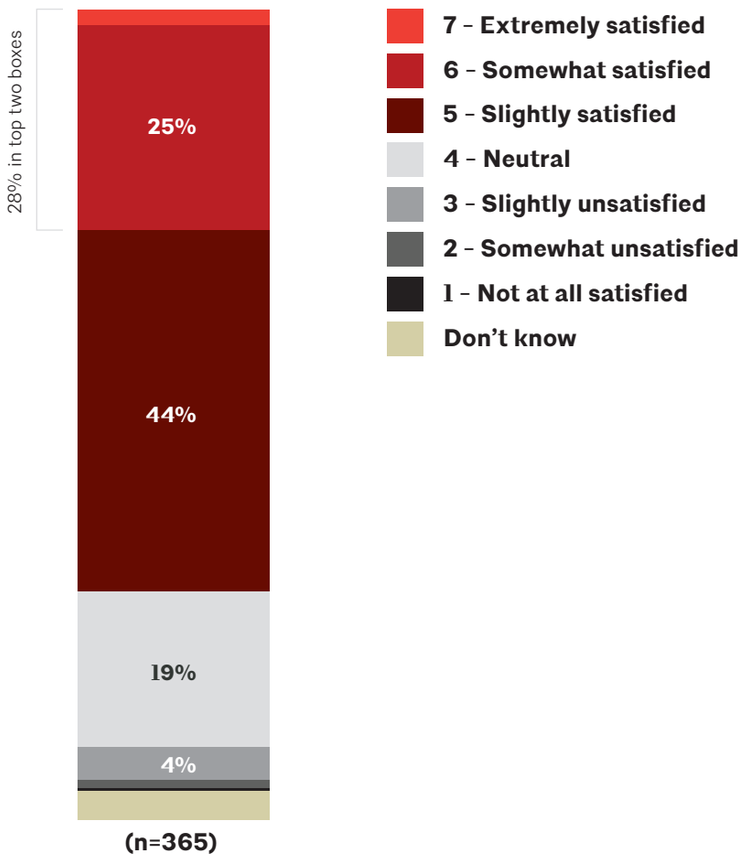
Satisfaction with manufacturer-provided information

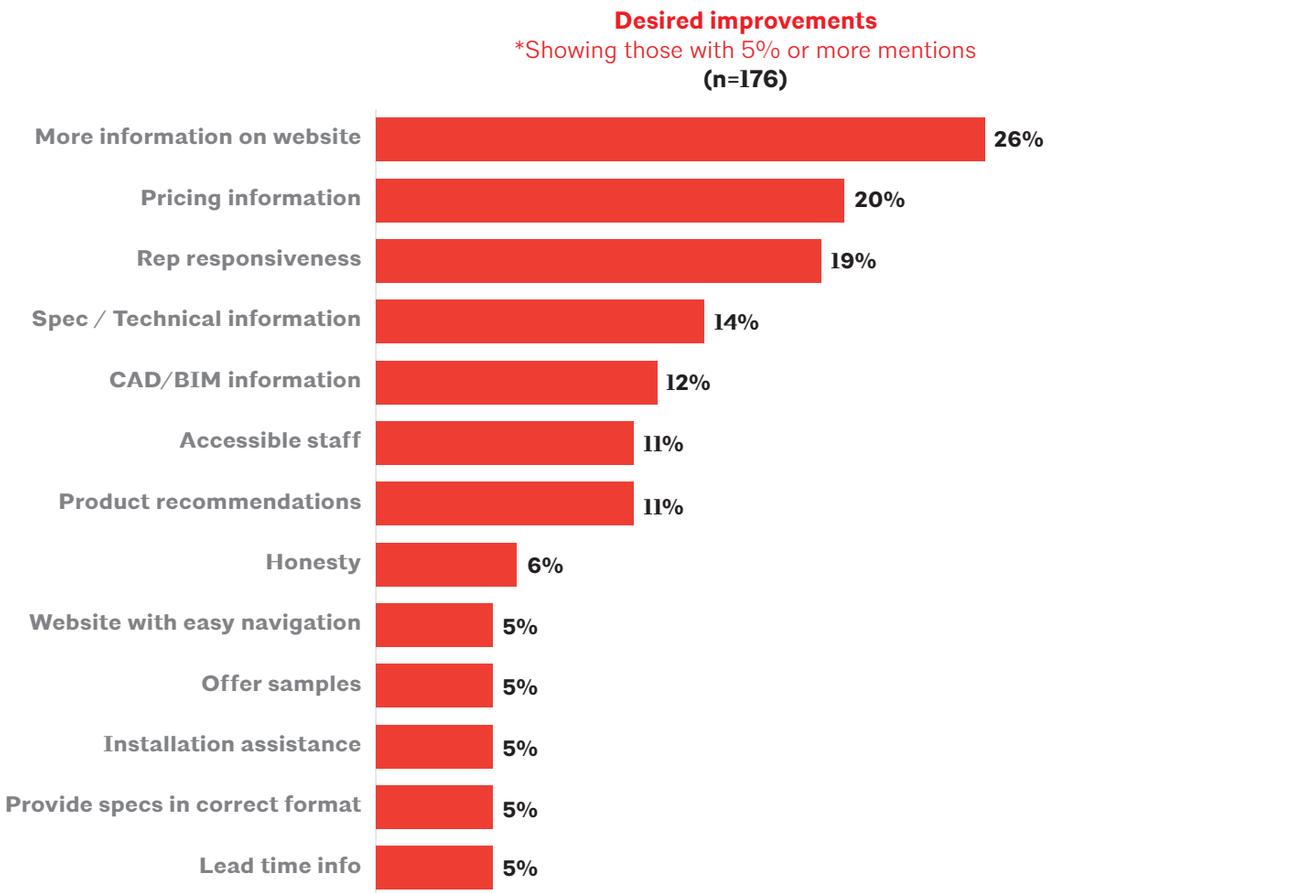
Architects need websites to be easier to navigate and more informative

Over two-thirds of architects are satisfied with manufacturers in terms of providing the information they need for projects with 71% scoring 5 or above.

Better and more accessible information on manufacturer websites is the most requested improvement desired by architects.

Older architects are more satisfied overall with manufacturer-provided info (36% top 2 box).





Base: Varies
All respondents

Q38. Overall, how satisfied are you with Building Product Manufacturers in terms of providing the information that you need for your projects?
Q39. What could Building Product Manufacturers (BPMs) do to better help you at any stage of the specification process? Please answer in as much detail as possible.

Desired improvements in their own words ...

More information on website	Rep responsiveness	Pricing information	Spec / technical information
"Generally **better/quicker access** to product information that I need as an architect. On their web sites, it tends to be **buried in a navigation maze**. I'd like more **comparative charts for products** showing the benefits of one product over others of their line and other manufacturers." *- Architect, Massachusetts* *US Licensed Architect – Traditional Practice*	"**Be more responsive** and have cost and lead time data more readily available. Understand how to detail their products and provide tips on typical pitfalls. Provide data quickly and be available to **meet with the client**." *- Project Manager, Missouri* *US Licensed Architect – Traditional Practice*	"Provide thorough **technical and pricing information**; provide info on previous installation of products when possible." *- Architect, Pennsylvania* *US Licensed Architect – Traditional Practice*	"Provide information on the relative **durability, value, and technical performance** of products of their own manufacture, and **comparative information** against the products of their competitors." *- Architect, New York* *US Licensed Architect – Traditional Practice*
"Have a good website with accurate and thorough **technical specs & details**. Have a **product rep with accurate prices** and knowledge about product as well as the ability to **provide samples** in a timely manner." *- Architect, California* *US Licensed Architect – Traditional Practice*	"Doing more **lunch and learns to update us** on what's changed, **building that relationship** in person, providing more pricing information more easily, and being willing to edit specs to make them competitive." *- Architect, Tennessee* *US Licensed Architect – Traditional Practice*	"**Pricing information** with a range of labor costs to evaluate against contractor pricing. More lessons learned on **product installations** - what works and what has been problematic." *- Architect, District of Columbia* *US Licensed Architect – Traditional Practice*	"They all should provide **spec sections** on their products. It is difficult to specify something when you don't have **technical/ performance information**." *- Architect, North Dakota* *US Licensed Architect – Traditional Practice*

Base: 176
Respondents who answered Q39

Q39. What could Building Product Manufacturers (BPMs) do to better help you at any stage of the specification process? Please answer in as much detail as possible.

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