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# 4SPECS 2008 USER SURVEY

## SUMMARY REPORT

### OVERVIEW

#### Demographics

- **74.3 % institutional and commercial.** 4specs users are working primarily on institutional (42.5%), commercial (28.2%), and light commercial (3.6%) projects. 14.7% of respondents' projects were residential.
- **\$139.7 million per user in projects.** The average 4specs user was responsible for 43 projects in 2007, totaling \$139.7 million in business. Average project value was \$3.2 million.
- **Primarily specifiers or architects.** Among the majority of 4specs users who work with design firms, the two most common job roles were specifier (43.2%) and architect (42.9%). 82.0% of the survey respondents work with a design firm.

#### Frequent vs. Occasional Users

Frequent users (65.5% of respondents) were defined as respondents who use 4specs at least weekly. The remaining 34.5% of respondents reported using 4specs less than weekly or for the first time. The characteristics of frequent users were considerably different than those of occasional and first-time users.

- **Three times the project value.** Frequent users were responsible for an average of \$181.7 million in business in 2007, with an average project value of \$5.8 million. In 2007, occasional users oversaw \$58.1 million in business, with an average project value of \$1.6 million.
- **Heavier on institutional, commercial, and residential multi-family.** Frequent users were more likely to be working on institutional, commercial, and residential multi-family projects. Occasional users were more likely to be working on industrial projects and five times more likely to be involved with residential single-family projects.

#### Loyalty

Respondents' use of other industry-specific Internet product research tools was limited.

- **86.0% prefer 4specs.** 86.0% of respondents named 4specs as their preferred industry-specific Internet resource. 8.1% chose Sweets and 3.5% listed Arcat as their preferred resource.
- **Frequency of use – 3.6% daily overlap.** Only 3.6% of those who use 4specs daily use any other industry-specific competitor's site daily or more often.
- **Frequency of use – 22.4% weekly overlap.** Only 22.4% of those who use 4specs at least weekly use any other industry-specific competitor's site at least weekly.

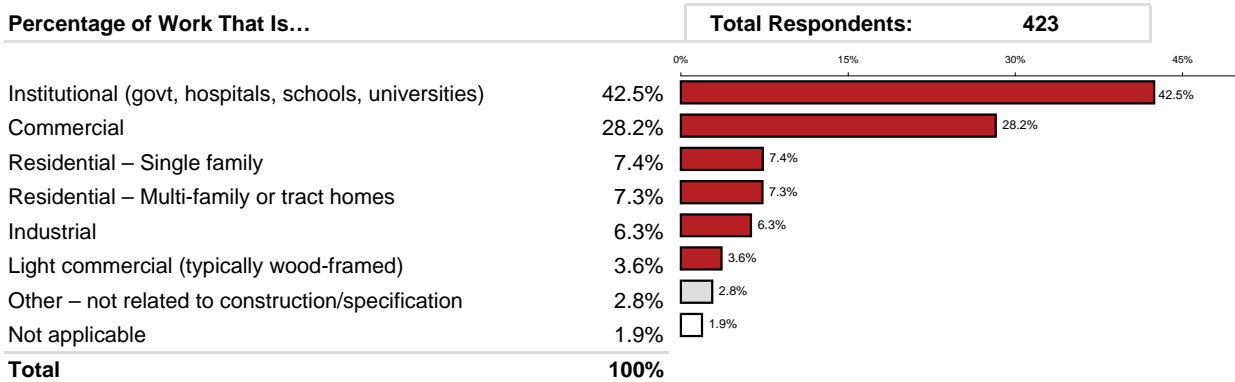
## Survey Results

### Survey Specifics

The independent research firm, Verified Audit Circulation, conducted this online survey February 21–March 30, 2008. A total of 423 surveys were completed for use in this analysis. Percentages for single-response questions are reported to the number of respondents who answered each question, or specific portion of a question, which may vary. Percentages for multiple-response questions are reported to all respondents of that question. This is a summary report of key findings. To view the full management report, visit [www.4specs.com/survey](http://www.4specs.com/survey).

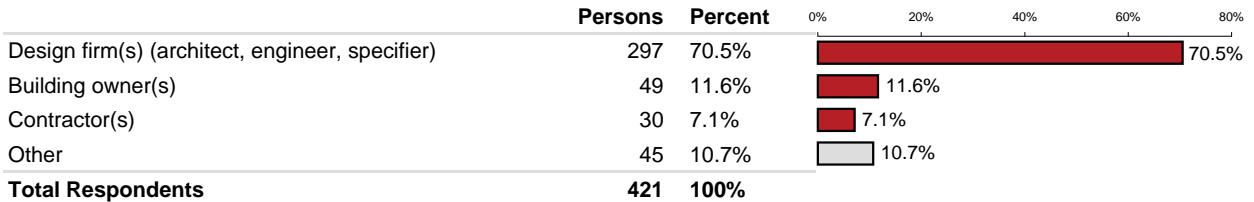
### User Profile

**Type of work – primarily institutional and commercial.** 74.3% of 4specs users' work is either institutional or commercial in focus – with 42.5% institutional, 28.2% commercial, and 3.6% light commercial.

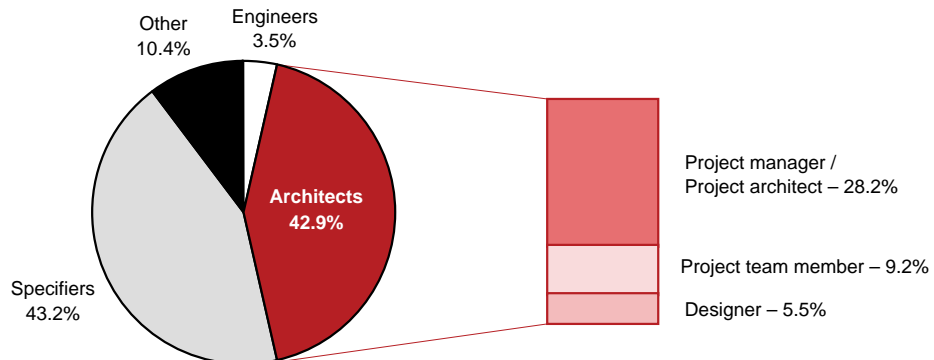


**82.0% work with design firms.** 82.0% of 4specs users say they work with a design firm. 70.5% report they work primarily with design firms.

### Is Your Primary Job Role Working With or Consulting To...



**Primary role among those who work with a design firm.** Among the 82.0% of 4specs users who work with design firms, 43.2% are specifiers and 42.9% are architects. Among the architects, 87.2% are production architects and 12.8% are designers.



## Survey Results

### User Profile (Continued)

**Volume of work.** The average 4specs user was responsible for 43 projects in 2007, totaling \$139.7 million in business.

#### Number of Projects Responsible for in 2007

Projects	Total Respondents:	320
Average number of projects	43	
Middle number	15	Responses ranged from 1 to 6,396.

#### Estimated Total Value of 2007 Projects

Value	Total Respondents:	320
Average value	139,676,257	
Middle value	\$40,000,000	Responses ranged from \$10,000 to \$1.8 billion.

**Time on site.** The average user spends 48.6 minutes in a typical day on 4specs or on manufacturer sites to which they are redirected by 4specs.

#### Time Spent on 4specs or on Manufacturer Sites Redirected to by 4specs in a Typical Day

	Persons	Percent	
Less than 15 minutes	46	13.1%	13.1%
15 to 30 minutes	114	32.4%	32.4%
More than 30 minutes and less than one hour	114	32.4%	32.4%
One to two hours	57	16.2%	16.2%
Two to three hours	15	4.3%	4.3%
Three to four hours	3	0.9%	0.9%
Four hours or more	3	0.9%	0.9%
<b>Total Counted in Average</b>	<b>352</b>	<b>100%</b>	
Not applicable	15	N/A	
<b>Total Respondents</b>	<b>367</b>	<b>N/A</b>	

**Avg. Time Spent:** 48.6 minutes

**Median Range:** > 30 min & < 1 hr

### Specifiers vs. Architects

150 of the 423 respondents said their primary professional role was that of specifier, whereas 149 respondents identified themselves as architects.

Specifiers were responsible for a substantially higher volume of business and larger jobs, and they use 4specs with much greater frequency than do architects. Almost two-thirds (64.7%) of specifiers use 4specs daily or more often. 44.7% of specifiers say they use 4specs multiple times daily.

Volume of Business	Specifiers (n = 150)	Architects (n = 149)
Average Number of Projects in 2007	34	20
Estimated Total Value of 2007 Projects	\$231,525,246	\$82,405,488
Average Project Size in 2007	\$6,813,021	\$4,141,812

Frequency of Use	Daily or More	Weekly or More	Monthly or More
<b>Specifiers</b> (n = 150)	64.7%	86.7%	93.4%
<b>Architects</b> (n = 149)	24.9%	59.1%	77.2%

# Survey Results

## Frequent vs. Occasional Users

375 of the survey respondents (88.7%) said they had used 4specs previously.

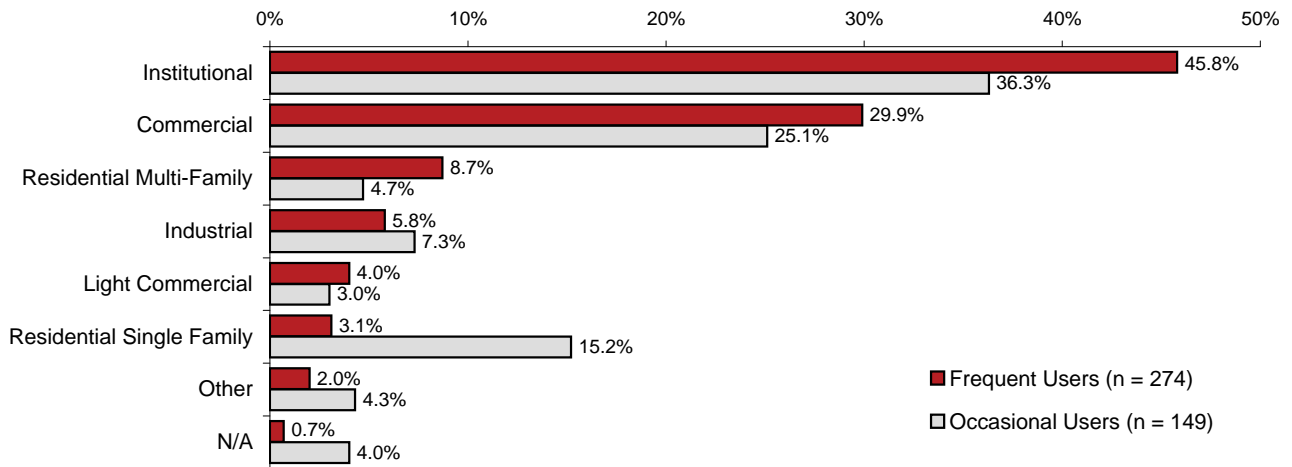
- **Frequent users:** 277 (65.5%) said they use 4specs at least weekly.
- **Occasional (and first-time) users:** 146 respondents (34.5%) use 4specs less than weekly or were entirely new to 4specs.

Frequent users have very different characteristics than occasional and first-time users:

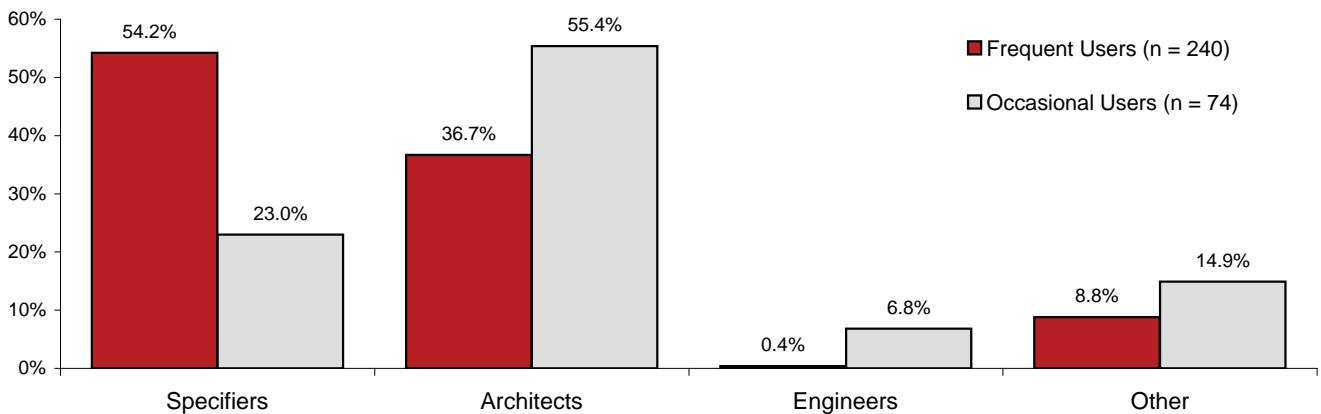
- The total value and average value of respondents' 2007 projects were more than three times greater for frequent users than for occasional users.

	Frequent Users	Occasional Users
Average Number of Projects in 2007	31	36
Estimated Total Value of 2007 Projects	\$181,709,674	\$58,056,571
Average Project Size in 2007	\$5,849,316	\$1,632,308

- Frequent users were more likely to be working on institutional, commercial, and residential multi-family projects. Occasional users were slightly more likely to be working on industrial projects and five times more likely to be involved with residential single family projects.



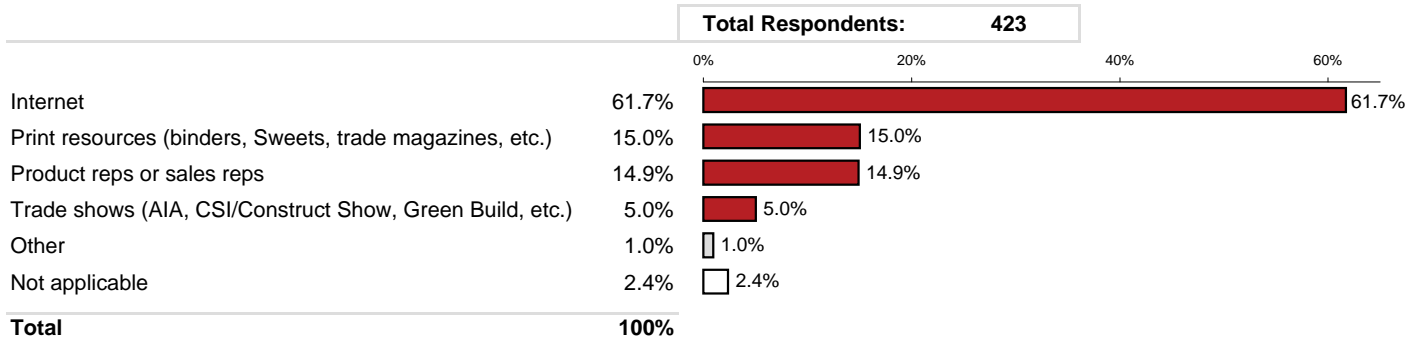
- Only 60.8% of occasional users work for design firms, versus 78.7% of frequent users. Occasional users were more likely to work with contractors or building owners.
- Among those who worked in design firms, frequent users were much more likely to be specifiers, whereas occasional users were more likely to be architects or engineers.



## Survey Results

### Preferred Research Tools

**Internet reliant.** For product research, 4specs users predominantly rely on the Internet (61.7%). Secondary sources include print (15.0%), product reps or sales reps (14.9%), and trade shows (5.0%).

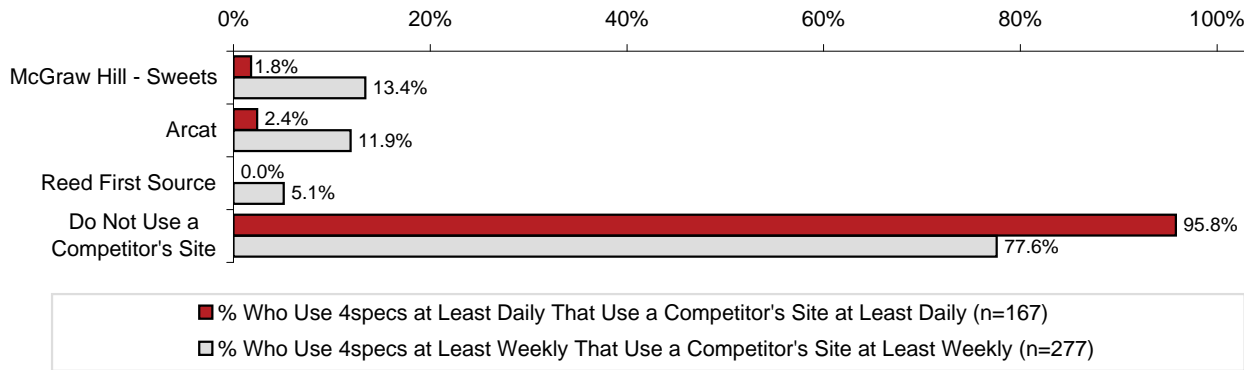


### Loyalty – Use of Competitors' Resources

Relatively few respondents to the 4specs user survey rely heavily on other industry-specific resources for their product research.

#### Frequency of Use

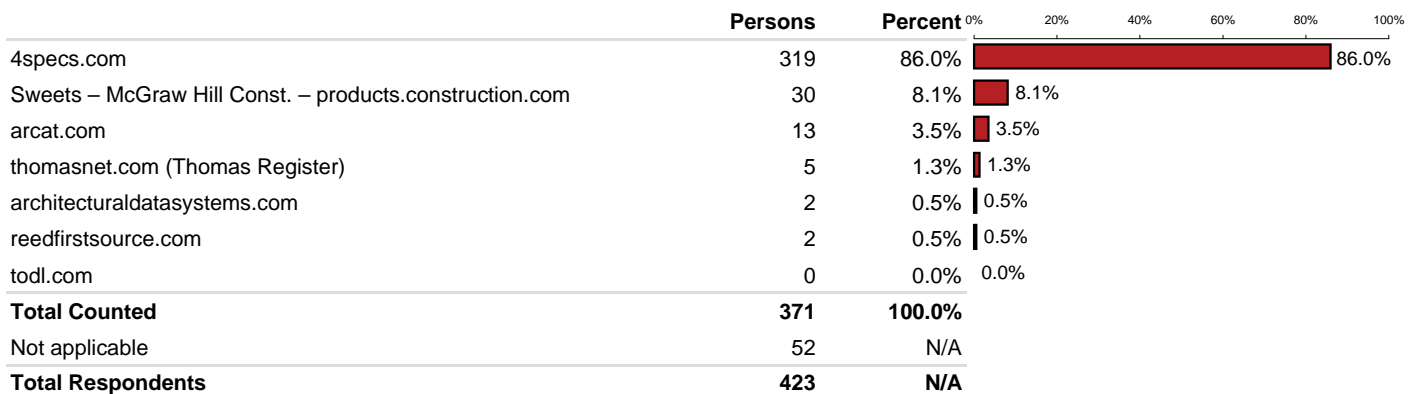
- **Daily usage.** Only 4.2% of those who use 4specs daily use any other industry-specific competitor's site at least daily.
- **Weekly usage.** Only 22.4% of those who use 4specs at least weekly use any other industry-specific competitor's site at least weekly.



**Preferred resource.** 86.0% of survey respondents named 4specs as their preferred industry-specific Internet resource. 8.1% chose Sweets, 3.5% listed Arcat, 0.5% named Reed First Source, and 1.4% selected another resource.

### Preferred Resource Among the Following Industry-Specific Internet Resources

"Not applicable" responses not counted in percentages

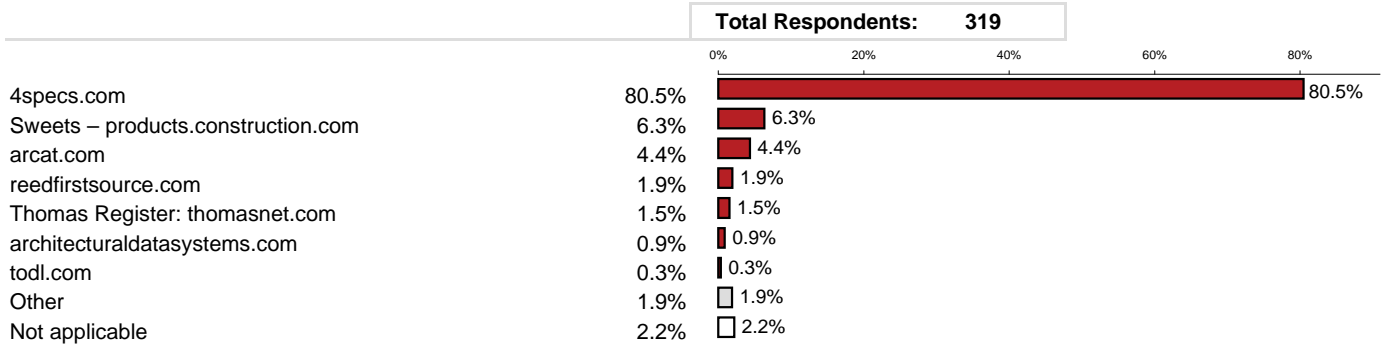


## Survey Results

### Frequency of Using the Following Industry-Specific Internet Resources for Product Research

Among the 319 respondents who named 4specs as their preferred product research tool, 80.5% of their industry-specific Internet research relies on 4specs. These 4specs users estimate that 6.3% of their research relies on Sweets, 4.4% relies on Arcat, 1.9% relies on Reed First Source, and 4.6% relies on others, including Thomas, Architectural Data Systems, and Todl.

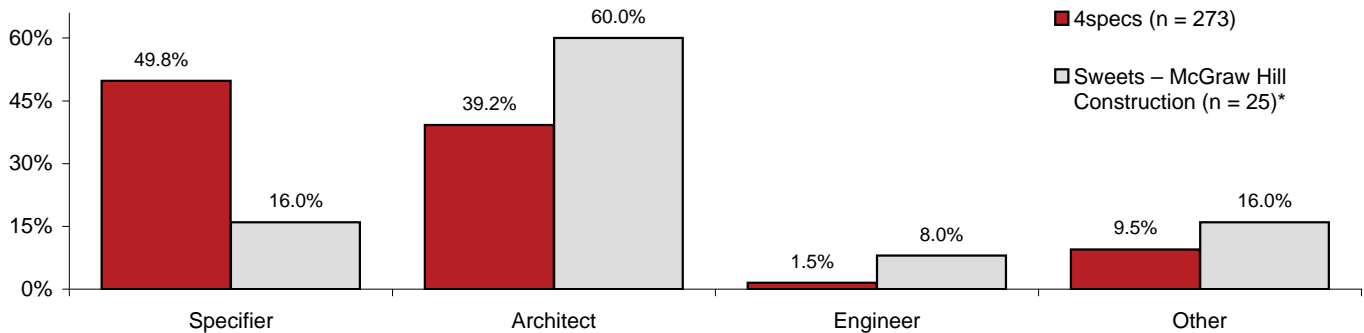
### Percentage of Product Research That Relies on the Following Industry-Specific Internet Resources



**4specs & Sweets user profile – Job roles.** The number of respondents who chose Arcat, Reed First Source, and other industry-specific Internet resources (Thomas Register, Architectural Data Systems, and Todl) were too small to profile. The 30 respondents who chose Sweets as their preferred industry-specific Internet resource had a very different profile than those who chose 4specs.

- Those who chose 4specs were more likely to be specifiers, whereas those who preferred Sweets were more likely to be architects or engineers. 49.8% of those who chose 4specs as their preferred resource were specifiers versus 16.0% of the Sweets users. Among the 4specs users, 39.2% were architects as compared to 60.0% of the Sweets users.

### Preferred Resource by Profession



\* Note: Five respondents of n = 30 did not answer this question.

**4specs & Sweets user profile – Volume of business.** Those who preferred 4specs were responsible for more than three times the dollar volume of business in 2007 as those who preferred Sweets. At \$5.3 million, their average project size was more than ten times that of those who preferred Sweets.

Volume of Business	Sweets (n = 30)	4specs (n = 319)
Average Number of Projects in 2007	106	32
Estimated Total Value of 2007 Projects	\$54,519,231	\$168,886,798
Average Project Size in 2007	\$514,893	\$5,277,757

**4specs & Sweets user profile – Frequency of use.** Those who chose 4specs as their preferred industry-specific Internet product research tool use their preferred resource (4specs) with much greater frequency than do those who favored Sweets. For example, 51.4% of those who prefer 4specs use 4specs daily or more often. Only 13.3% of those who prefer Sweets use their preferred resource daily or more frequently.

Frequency of Use	Daily or More	Weekly or More	Monthly or More
4specs (n = 319)	51.4%	83.1%	95.6%
Sweets (n = 30)	13.3%	46.7%	83.3%