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10. Conclusions

This year's Barbour Report charts the growth in use of the internet, now the main means of researching product information, whether via online product directories or a search engine. It is clear that a good web presence is an absolute requirement for manufacturers. A poor web site not only conveys a negative impression of a company but it can also actively drive potential customers to seek out a competitor.

Whilst the research shows that web sites have become easier to use, our expectations have been raised by developments in internet speeds and in web sites generally. Many of the complaints made about web sites when this subject was last researched in the 2002 Barbour Report remain similar, albeit there has been an improvement. Surprisingly, over four in ten product decision-makers cannot think of a product web site which they find particularly good; an opportunity for manufacturers to gain a competitive advantage.

Re-visiting the recommendations to manufacturers made in the 2002 Barbour Report, it is surprising how many of them still apply. Providing good product search facilities and comprehensive technical information, plus downloads and calculation tools, with no requests to log-in, continue to be important user requirements. Many home pages still do not take the opportunity to explain how the user may benefit from using the site and its features. Sustainability information has also become important.

Looking to the future, users do not necessarily want to see cutting edge advances in technology. They do however require facilities which make web sites easier to use, and overcome some of the drawbacks, such as being able to compare sites and to bookmark pages.

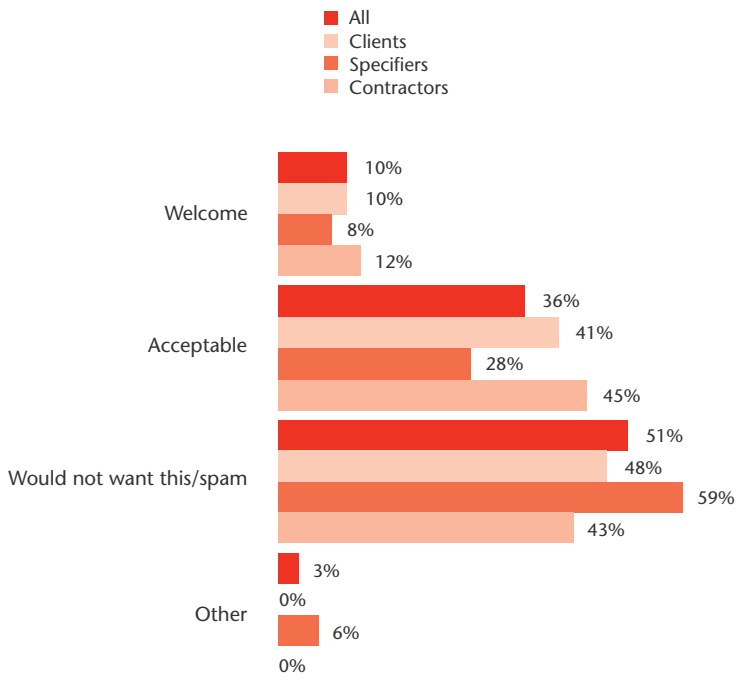
While early research shows that product decision-makers expected use of hard copy literature to decline, it is clear that the two media are actually working effectively together. Product directories are particularly used when researching a product from scratch. Brochures offer better visual qualities and have different physical benefits. Importantly, the majority prefer to download literature from the internet.

The internet also offers manufacturers the opportunity for direct contact, with 70% of product decision-makers saying they go on to contact the manufacturer as a likely next step having used their web site. As many of these calls are to discuss specific project applications, they are a good source of active leads. A good web presence is the start of this process, and its importance as a marketing tool cannot be over-emphasised.

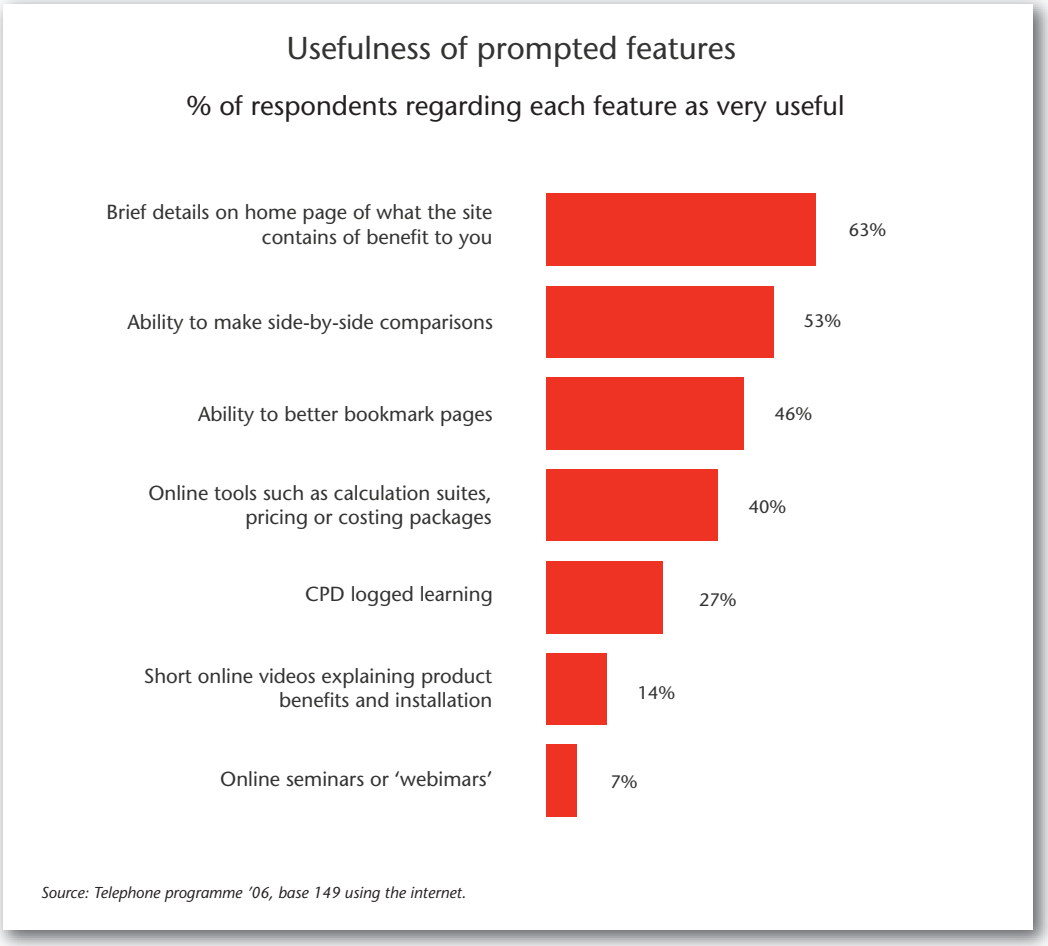
9.3 Electronic communications from manufacturers

The internet also offers manufacturers new ways of communicating with potential customers. Use of product cards and other forms of direct mail are in decline amongst users (section 5.7). However manufacturers are now finding ways of keeping users informed by e-mail.

View on receiving occasional electronic broadcasts such as newsletters by email from known and trusted manufacturers



Source: Telephone programme '06, base 149 using the internet.



Usefulness of prompted features
% of respondents regarding feature as very and fairly useful

	Overall (149)	Clients (29)	Specifiers (71)	Contractors (49)
Brief details on the home page of what the site contains of benefit to you	94%	93%	90%	100%
Ability to make side-by-side comparisons	87%	72%	81%	96%
Ability to better bookmark pages	80%	76%	79%	82%
Online tools such as calculation suites, pricing or costing packages	74%	72%	75%	73%
CPD logged learning	65%	62%	75%	53%
Short online videos	60%	66%	51%	71%
Online seminars or 'webimars'	39%	41%	41%	35%

Source: Telephone programme '06, base 149 using the internet.

Features which were suggested in the groups included:

- Better structured menus.
- More information on the home page about the content of the site.
- No log-ins.
- Standard approach to web site design based on Windows.
- More information on the Unique Selling Points (USPs) of individual products.
- Videos demonstrating installation.

A further feature that is required of online delivery, which was referred to in section 6.3, is improved search engines to find products and manufacturers.

9.2 Usefulness of specific features for the next generation of web sites

With constant developments in technology, web sites are capable of delivering new and improved features. However, the previous section showed that users are still concerned about the fundamentals of many web sites, particularly ease-of-use and finding the information.

A question was included in the survey to gauge interest in some new features or different approaches.

The most attractive of the options is not a new innovation; 63% would find it very useful to have a summary on the home page of the content of the site, which would be of benefit to them, rather like having a summary on a book cover of the content.

Other useful features also relate to making it easier to use web information. For example, 53% would be very interested in being able to make side-by-side comparisons, which is one of the reasons why hard copy literature is preferred. 46% would like to be able to bookmark pages, bringing use of web sites closer to how we use literature. Online calculation tools are already offered by many sites, and 40% would find it very useful to have more of these.

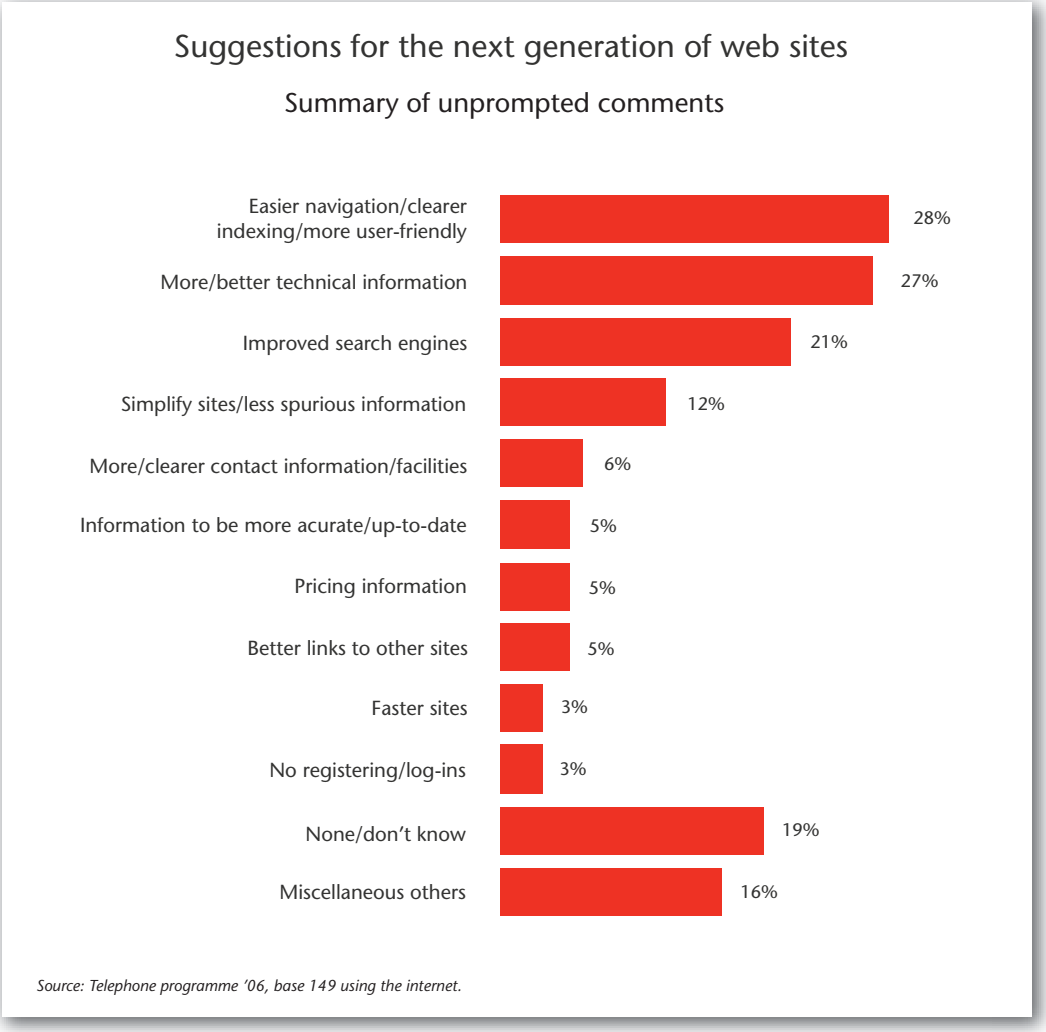
While online videos and web delivered seminars ('webimars') are not considered useful by many, this technique is growing in use in other industry sectors. Some in the focus group mentioned that it could be useful to have product demonstrations and installation shown in online videos.

9. Future requirements of online delivery

- **The next generation of web sites need to be easier-to-use and have better access to find information, rather than offering any advanced and new technical features.**
- **The ability to compare web sites side-by-side, and being able to bookmark pages would be welcome advances to web sites to help replicate how we use literature.**
- **A greater use of calculation tools would be attractive to many product decision-makers.**
- **Just under half would find occasional contact via e-mail broadcasts from known manufacturers to be acceptable, perhaps a more productive alternative to direct mail.**

9.1 Suggestions for the future

Suggestions for the next generation of web sites mainly relate to ease-of-use, with better access to technical information.



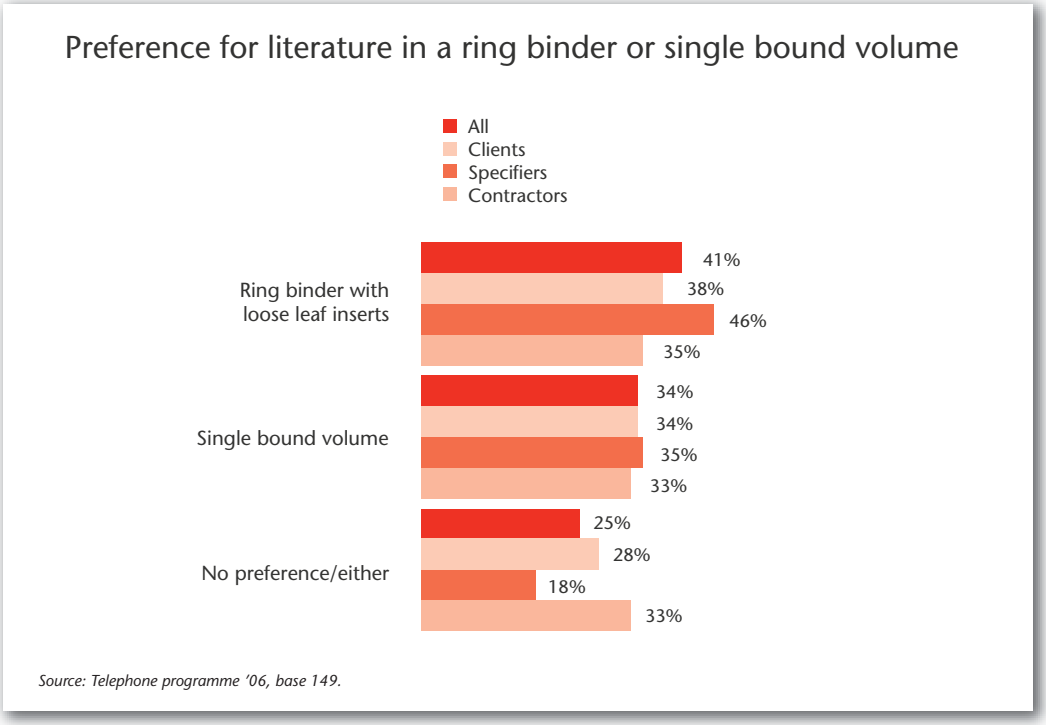
In the focus group at the start of the project, comments were made about web site design not matching the thought and behaviour processes of the end users, a problem also identified in earlier Barbour Reports. Manufacturers need to involve technical construction industry professionals when structuring their literature and web sites.

The reasons for requesting a brochure rather than downloading it are, in order of importance:

- Pictures and colours are better in a brochure.
- Brochures are easier to flick through.
- For the project files.
- Ensures it is up-to-date.
- Can show to others.

8.3 Preferred format for literature

Literature can be provided in several formats, the most common being either a series of leaflets in a ring binder or a single bound volume. Each approach has benefits and drawbacks. Opinion on the best option is almost evenly divided.

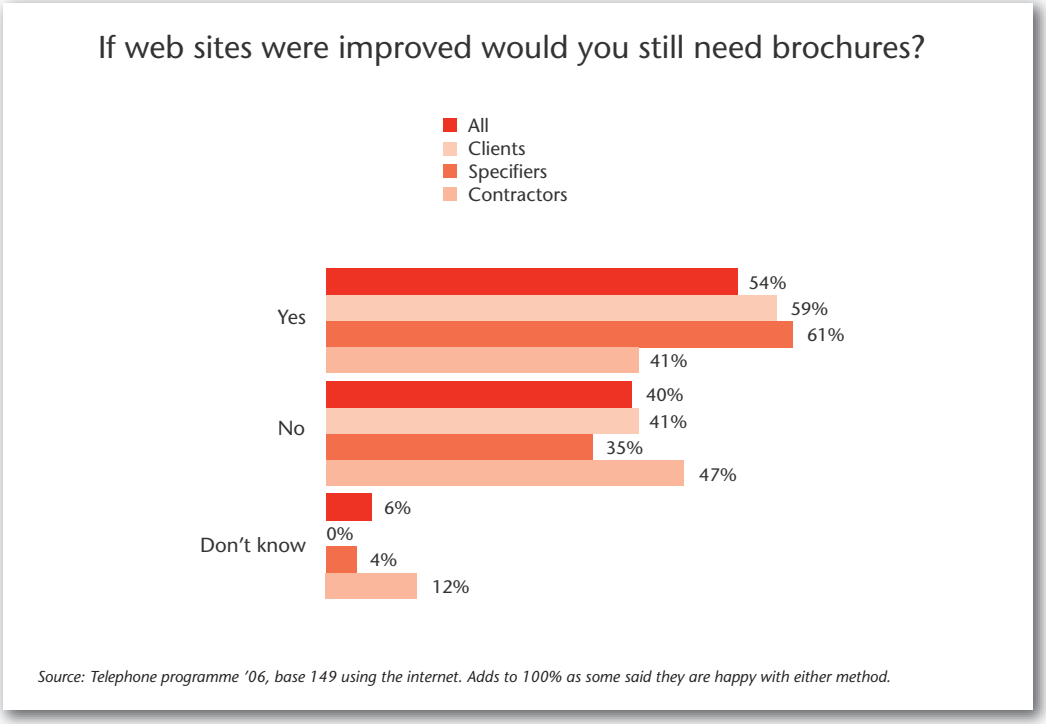


Source: Telephone programme '06, base 149.

8.2 The need for hard copy

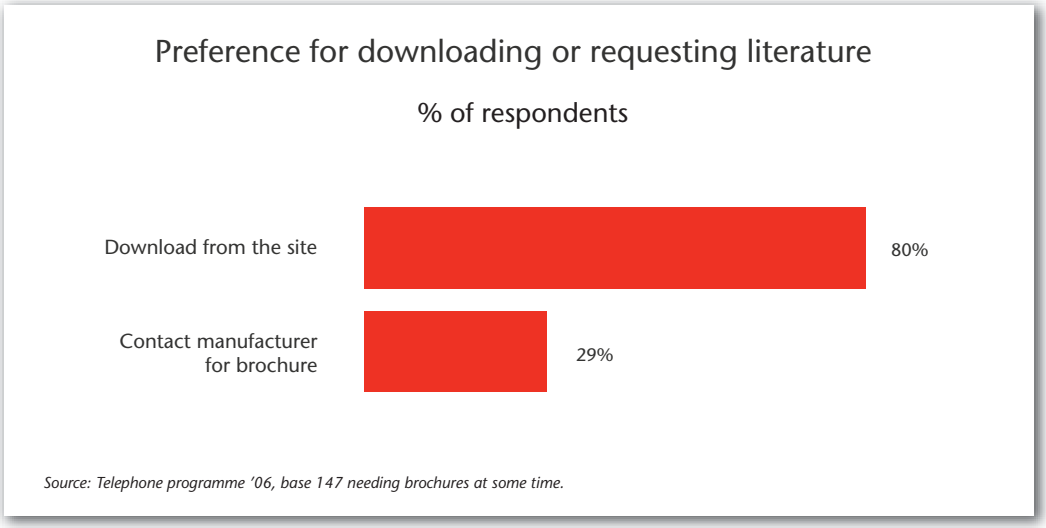
There was a consensus in the focus group that the internet will not completely replace hard copy literature in the short term, as manufacturers are still not utilising the internet to its full potential.

A question was included in the telephone interview programme to quantify this. If web sites were to be improved, 54% would still want brochures. However it is Clients and Specifiers who particularly want to continue to use brochures, whereas over half of Contractors would be happy to use the internet. Reasons given for continued use of hard copy are similar to the benefits quoted earlier, i.e. it is easier to flick through brochures and make comparisons, brochures are more 'visual' and can be shown to others. The conclusion may be that brochures should deliver a more visual element than the internet, with high quality photos of products in use and good colour reproduction.



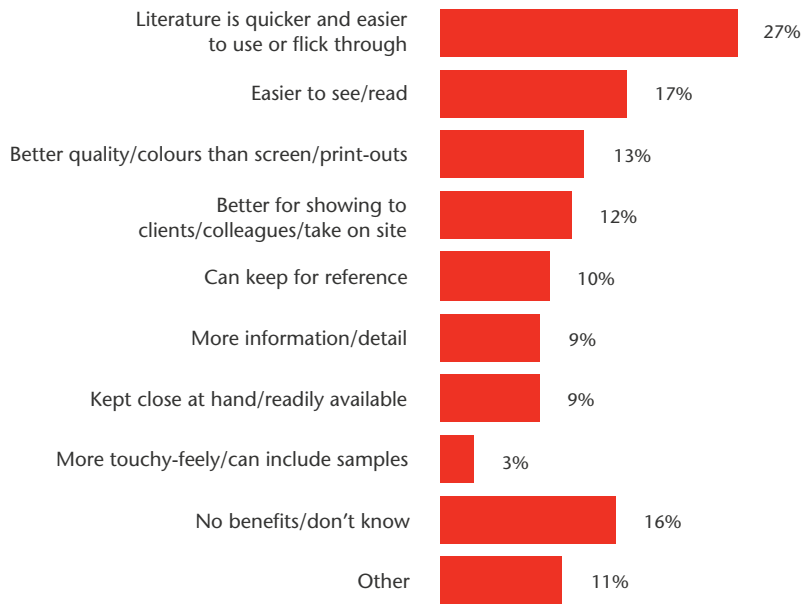
Source: Telephone programme '06, base 149 using the internet. Adds to 100% as some said they are happy with either method.

Having selected a suitable product by whatever means, two-thirds said they need a copy of the literature. The majority tend to download literature from the web site. Therefore manufacturers need to ensure that their literature is easily identified and downloadable via their web sites.



Source: Telephone programme '06, base 147 needing brochures at some time.

Benefits of the literature compared to the internet



Source: Telephone programme '06, base 149 using the internet.

Some comments about the benefits of literature:

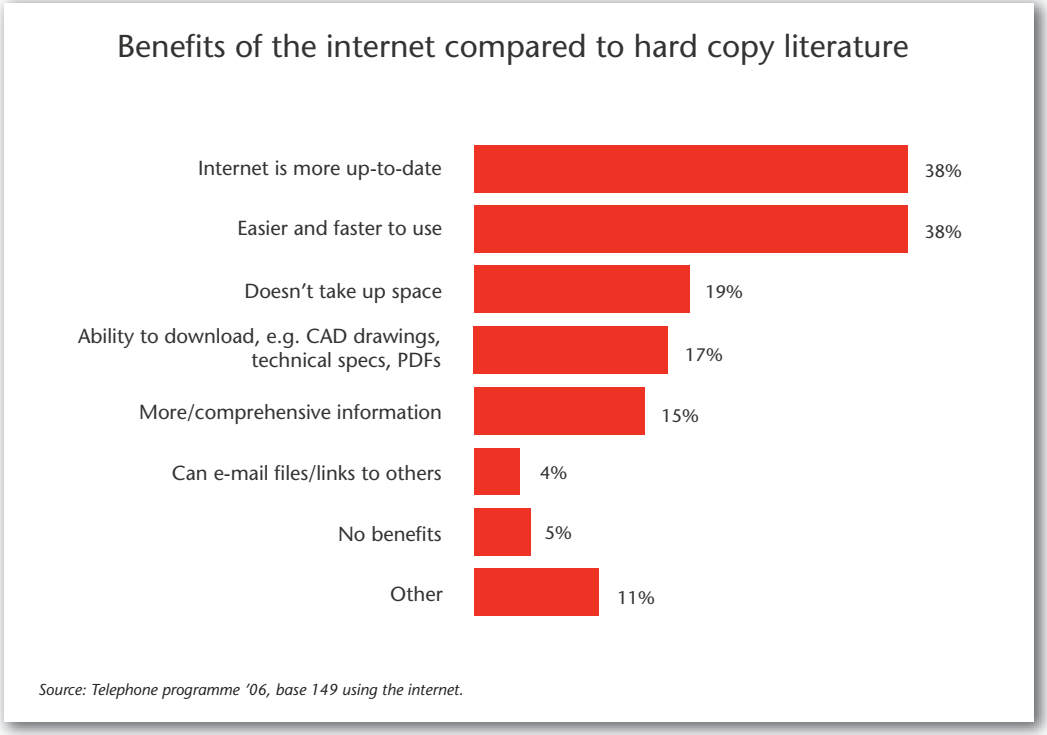
- It can be easier to understand, the web sites are too clever sometimes.
- I don't always like staring at a computer screen. Searching can take ages and be frustrating.
- I sometimes find that if there is a hard copy of a manufacturer's range on my desk it acts as a prompt, but it is only of benefit to me at my desk.
- I think that they provide quicker access to information for example radiators, trawling through all the web sites provides me with too much information which I could have easily obtained by looking at a couple of brochures.
- It's a visual thing. If I don't open a particular page on the internet then I don't see everything.
- New products. There is no way that we can know about any new products unless they send us a brochure or a Rep calls, or we accidentally find it on the web, which is not likely.
- Visually you can determine what you want rather than having to wade through PDF's and passwords.
- You are able to have 3 or 4 brochures open on your desk to compare different manufacturers' products. Also they're portable, so when you go to site you can take them with you.

8. Web sites versus hard copy

- **The benefits of web sites are that they are expected to be up-to-date and are considered to be easier and faster to use than literature.**
- **The benefit of literature is that it is easier to flick through and is a more 'visual' medium - of particular importance to Architects.**
- **If web sites were to be improved, 54% of decision-makers would still want brochures - particularly Clients and Specifiers, less so Contractors.**
- **80% of decision-makers prefer to download literature from web sites rather than request a copy.**
- **Literature from manufacturers has better pictures and colours, is easier to work with, can be shown to others and put on a project file. Seeking a copy from the manufacturer is also felt by some to be the best way of ensuring it is up-to-date.**

8.1 Benefits of online and hard copy delivery of product information

The main benefit of the internet compared to hard copy is that it is (perceived to be) more up-to-date, and is easier and faster-to-use. Literature, on the other hand, is better for 'flicking' through, is more 'visual', and more portable.

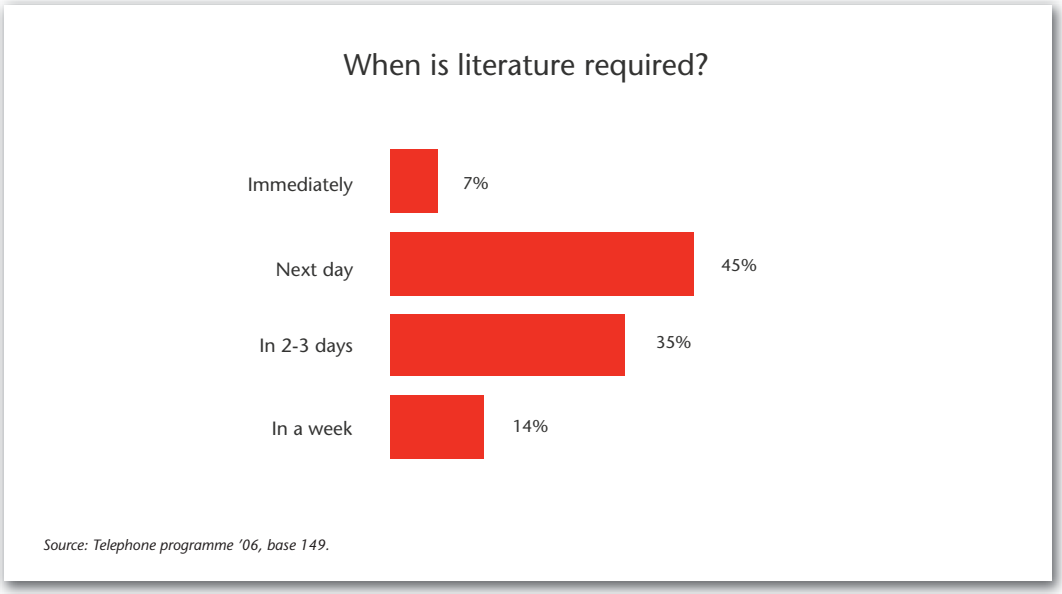


Some of the comments about the benefits of the internet:

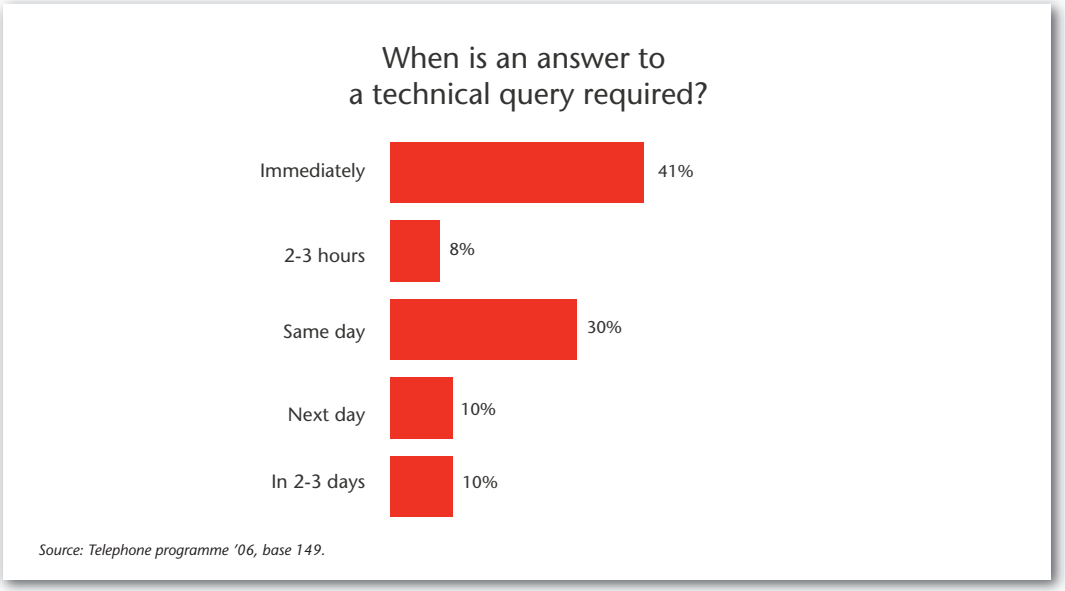
- It's all in one place.
- Can't lose parts like you can with hard copy.
- Needs no maintenance.
- A multi-media response, like videos, it's more interactive.
- Being portable basically.
- Internet information needs no maintenance.
- I find that the links to other pages makes the information you are looking at more flexible and more visual.
- We can print off what we want, we can order online and there are links between different web sites.

7.8 Speed of response required when contacting a manufacturer

When product decision-makers contact a manufacturer for further information, they require it fairly promptly or they may move on to a competitor. Manufacturers need to ensure that their systems and processes meet these needs. Literature is typically required the next day or at least in 2-3 days, while answers to technical queries are needed the same day.



Source: Telephone programme '06, base 149.



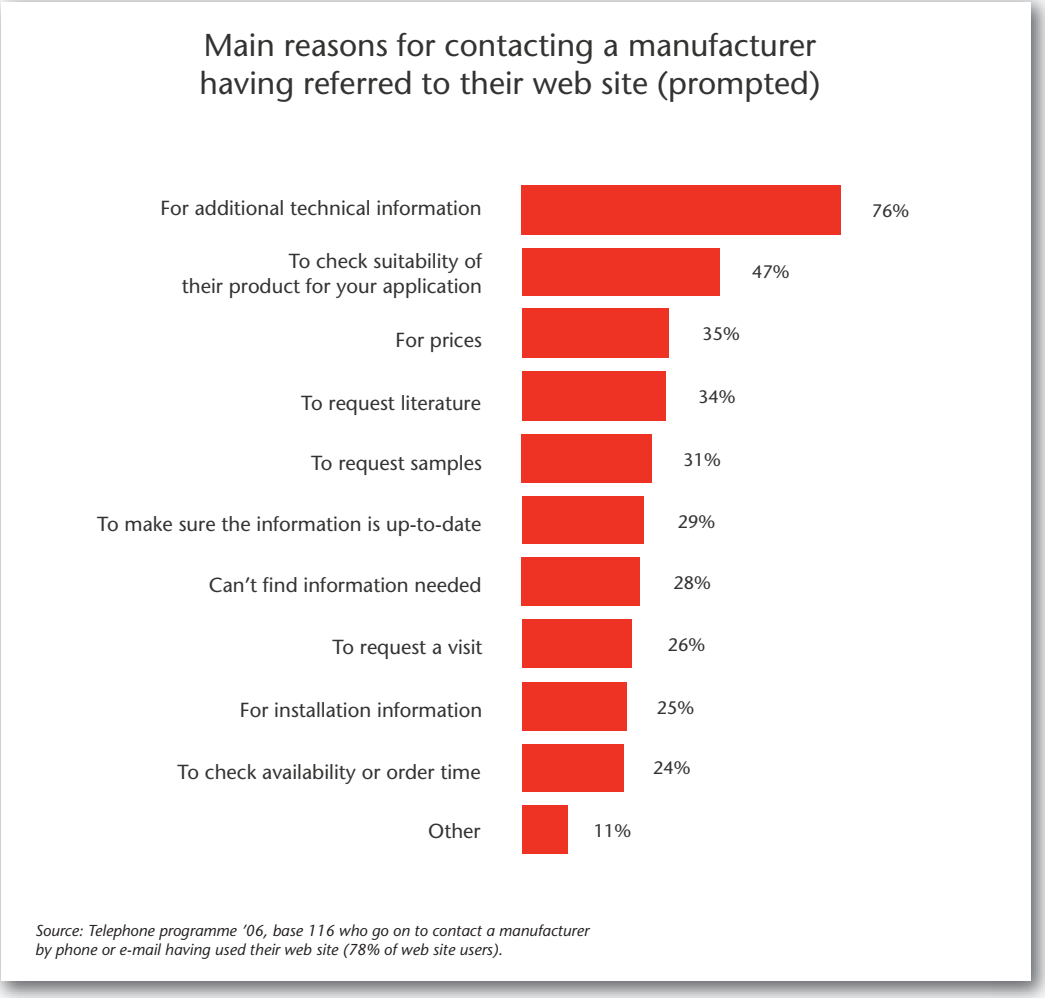
Source: Telephone programme '06, base 149.

7.7 The need for direct contact with manufacturers having visited a site

Web sites do not meet all information needs; 70% said they go on to contact a manufacturer as one of their most likely next actions. This contact can be for several reasons, but the need for more technical information is a main driver. Wanting to discuss the suitability of a product in a specific application is also a main reason for direct contact.

Web sites have improved in their information delivery; 28% of product decision-makers now contact the manufacturer direct because they cannot find the information they require on their web site, compared to 58% in 2001 (Barbour Report).

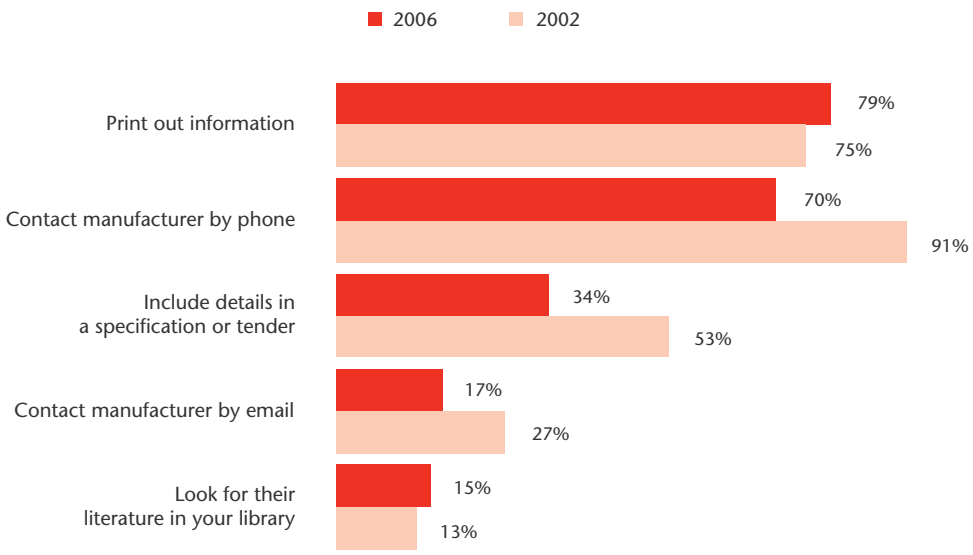
The graph in 7.6 shows a fall in the percentage contacting the manufacturer, from 91% in 2002 to 70% in 2006. However this still represents a high percentage going on to contact the manufacturer. This level of direct contact as a result of using a web site will be welcome news for manufacturers as it provides an opportunity for dialogue with a potential customer. 26% may even request a sales visit.



Source: Telephone programme '06, base 116 who go on to contact a manufacturer by phone or e-mail having used their web site (78% of web site users).

A question was asked to identify whether users would stop making direct contact with manufacturers if web sites were to be improved. Decision-makers felt that there will continue to be the need to discuss specific applications with manufacturers, and this is unlikely to change even with a drastic improvement in web sites.

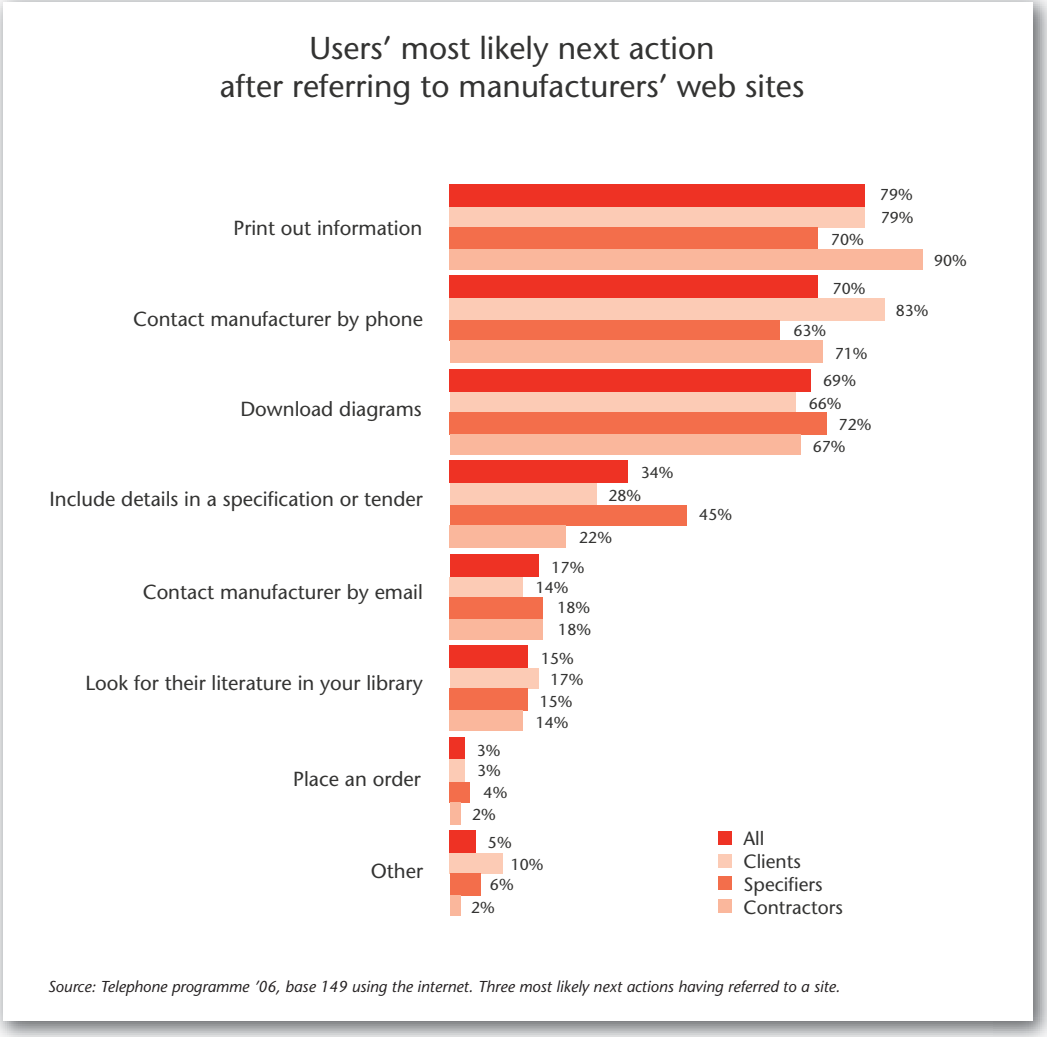
Users' most likely next actions 2006 compared with 2002



Source: 2002: Telephone programme, base 150 using the internet at least once a month.
2006: Telephone programme, base 149 using the internet.
Actions in both research programmes included (downloading diagrams and placing an order not included in 2002)
Based on three most likely next actions.

7.6 Next action after visiting a site

Manufacturers need to be aware of the actions which users are most likely to take next having used their sites, to ensure they are capable of responding as needed. The most common actions are to print out literature and to phone for information. Web sites are important in making direct contact with decision-makers at the time they are specifying or selecting products. A poor web site may cause decision-makers to look at a competitor's. Therefore, both contact details and literature to download and print should be made easily available.

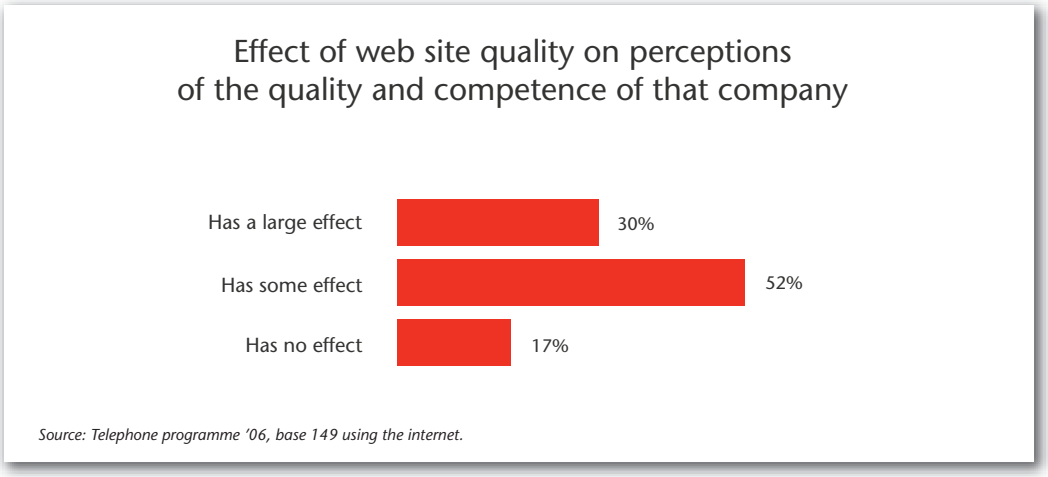


Source: Telephone programme '06, base 149 using the internet. Three most likely next actions having referred to a site.

Although the two main actions having referred to a web site are the same as identified in the 2002 Barbour Report, fewer people now go on to contact the manufacturer by phone or e-mail, suggesting that there has been an improvement in the information delivery of web sites and less need for reassurance that the information is up-to-date and correct.

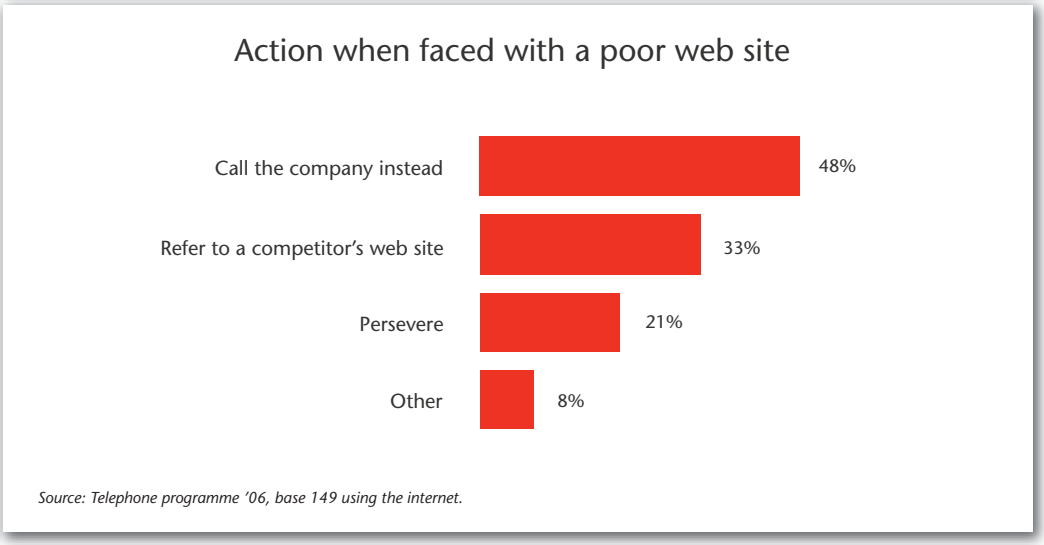
Interestingly, fewer now go on to include details in a specification or tender. The higher ratio of Specifiers in the 2002 survey, does not account for all of the difference.

The quality of a manufacturer's site has an effect on perceptions of that company - with 82% explaining it affects their perceptions to some extent.



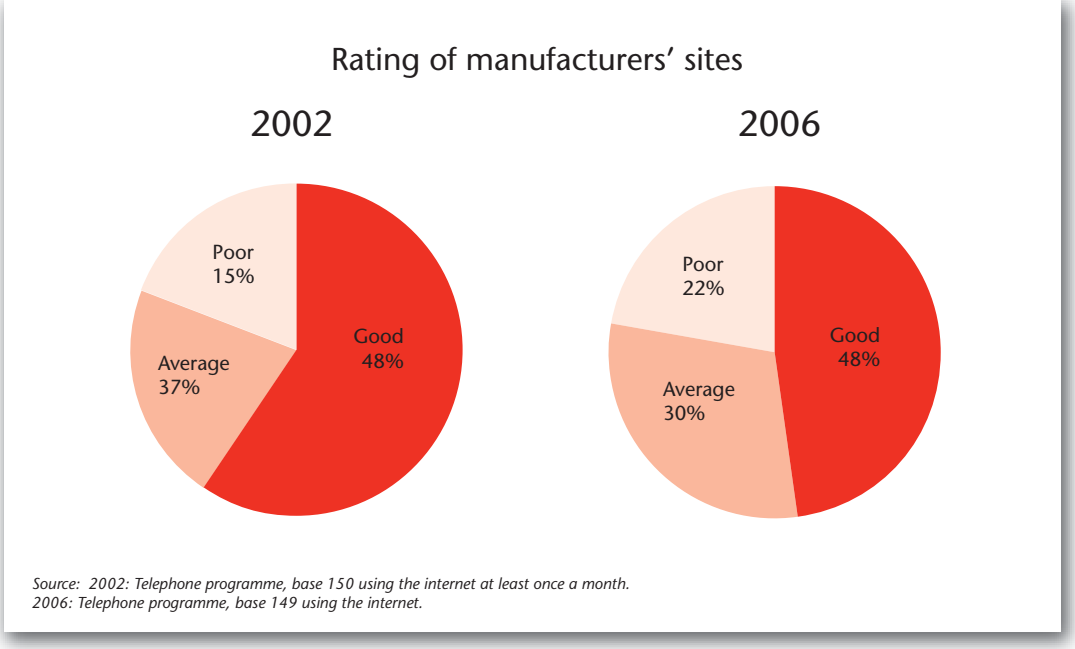
Not only is a poor web site likely to have an adverse effect on a company's image, but most worryingly for manufacturers it may drive a potential customer to use a competitor.

Research reveals that almost half pick up the phone, whilst a third refer to a competitor's web site. Only 21% persevere with the poor web site.



7.5 Quality of manufacturers' web sites

The percentage of poor sites has increased from 15% in 2002 to 22% in 2006 despite significant investments made by manufacturers in their web sites. Although when asked to rate the general quality of manufacturers' sites, an average of 48% of sites are considered to be good - which is exactly the same as in 2002. Expectations have no doubt risen as technology has developed, but it appears that not all sites have kept up.



Source: 2002: Telephone programme, base 150 using the internet at least once a month.
2006: Telephone programme, base 149 using the internet.

Sites named as 'top' include Kingspan, British Gypsum and Rockwool, although no single site received more than 11% of mentions.

Top 6 product manufacturers' sites – ranked by number of mentions

Source: Telephone programme '06, base 149 using the internet.

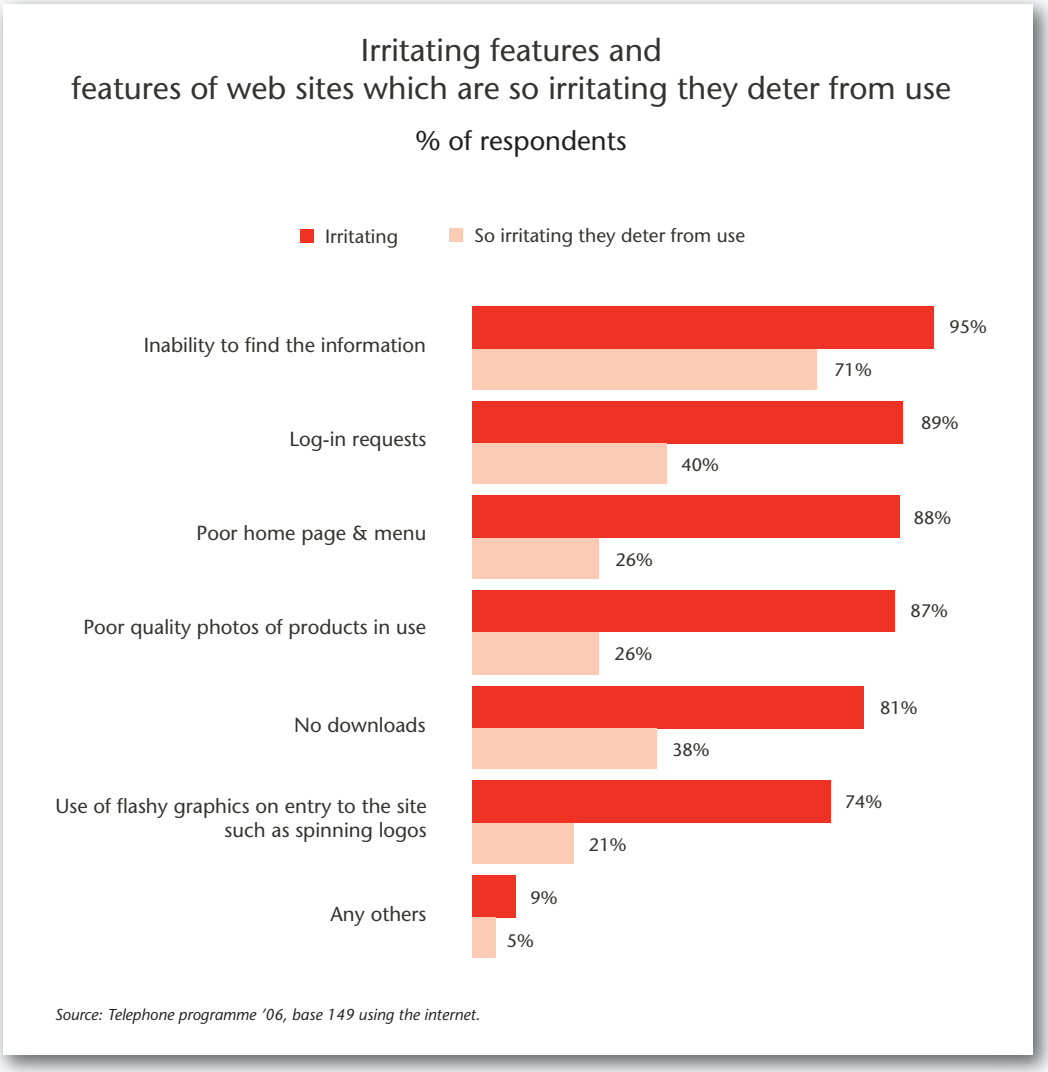
- Kingspan
- British Gypsum
- Rockwool
- Armitage Shanks
- Corus
- MK Electrical

43% could not name any site which they consider to be particularly good.

7.4 Features of web sites to be avoided

Not being able to find the information is the most irritating part about a site and naturally deters product decision-makers from future use. Testing a site for ease-of-use from the user's point of view is clearly critical.

A log-in request is a feature to be avoided as it deters 40% of users. Lack of downloads, poor quality photos and use of flashy graphics can also deter at least 20% of visitors from returning.



Source: Telephone programme '06, base 149 using the internet.

Some specific quotes about failings of web sites:

- A lot of manufacturers just upload their catalogues and don't put a lot of effort into a web site. This makes it difficult to find things.
- Downloads can be difficult, too slow and poor quality. Sites can be too fussy, hard to navigate.
- I find some of the contact information is poor. I am on the Board of my company, and I really want to get the contact number or speak with someone at a similar level to myself, rather than sending them an email. I also find the broad search facilities frustrating when you are looking for something in particular.
- I think that they contain too much information, sometimes I end up ringing up instead. The layout is often poor and the information is not detailed enough.
- Information not up-to-date. I have gone to specify something in the past only to find out it had been discontinued.
- Internal search engines are often restricted. Contact facilities can be poor, giving you an email address only and that's not reliable for getting a response.
- Not being very comprehensive. Some only have a telephone number and one picture, which is not what you expect. ... If you are going to have a web site have a proper one with all the information.
- Sometimes I find the image quality is quite poor. Also details on specifications can be hard to find; web pages are often used as sales tools rather than technical reports, so they are a sales pitch.

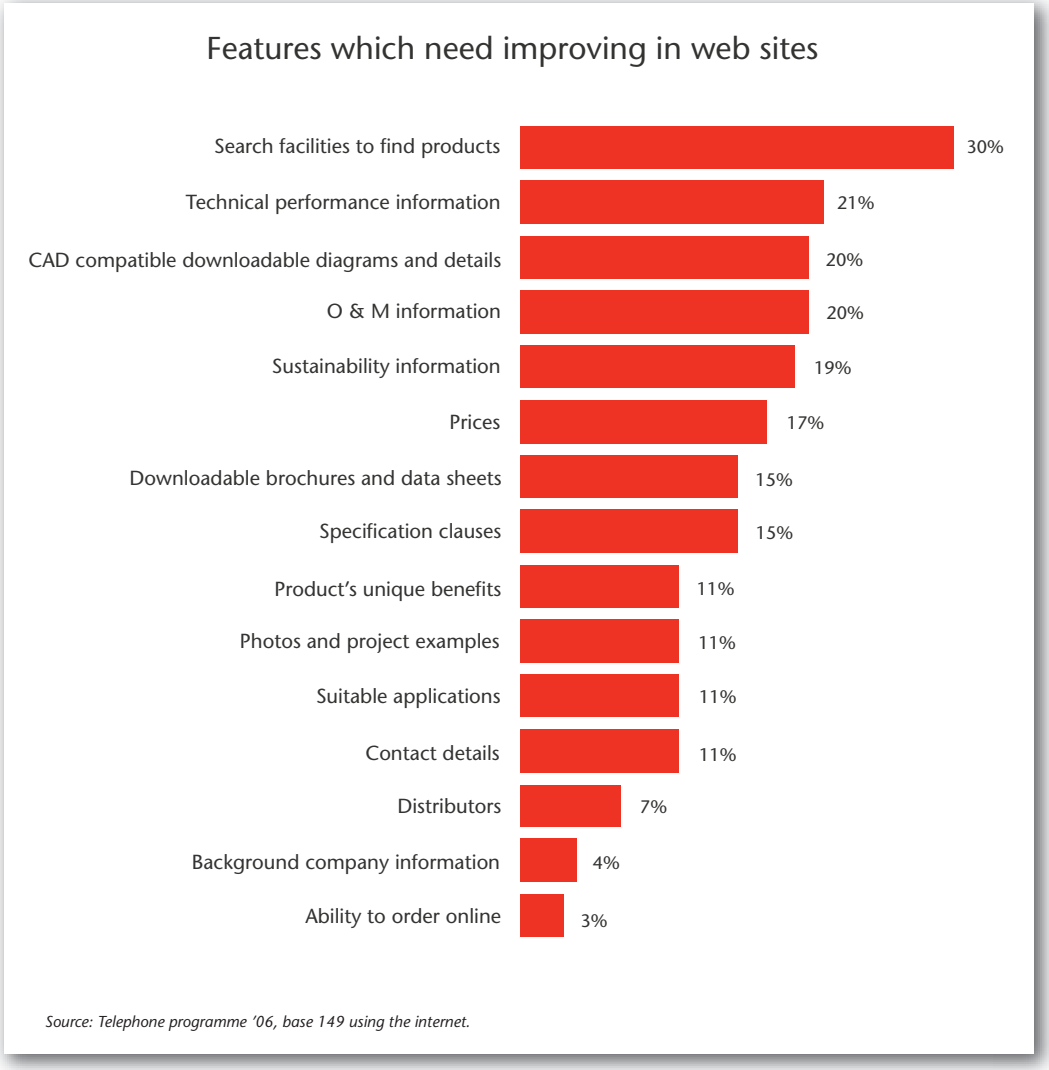
There are signs of improvements in web sites in comparison with results in the 2002 Barbour Report. The technical information on sites in particular has improved; 21% said this is most in need of improvement this year compared with 39% in 2002.

7.3 Improvements needed

Respondents to the telephone and web surveys felt that the most critical web site feature, namely the search facility, is the feature most in need of improvement. 30% find product search facilities to be particularly poor.

Technical information, which is the second main requirement of web sites was criticised by 21%. This could refer to the ease of finding the information and / or the quality of the information provided.

Contact details, the third most important requirement, do not seem to be so much of a problem, with only 11% describing this feature as being particularly in need of improvement. Wanting to download literature is also a main driver to use a site, but this requirement is also generally being met.



Source: Telephone programme '06, base 149 using the internet.

When respondents were asked to describe common failings of web sites, again the search facilities and technical information emerged at the top of the list. The top four failings, mentioned unprompted, are:

- Hard to find information, poor search facilities (31% of respondents).
- Not enough or poor technical information and downloads (29%).
- Difficult to use site (24%).
- Too much superfluous information (11%).

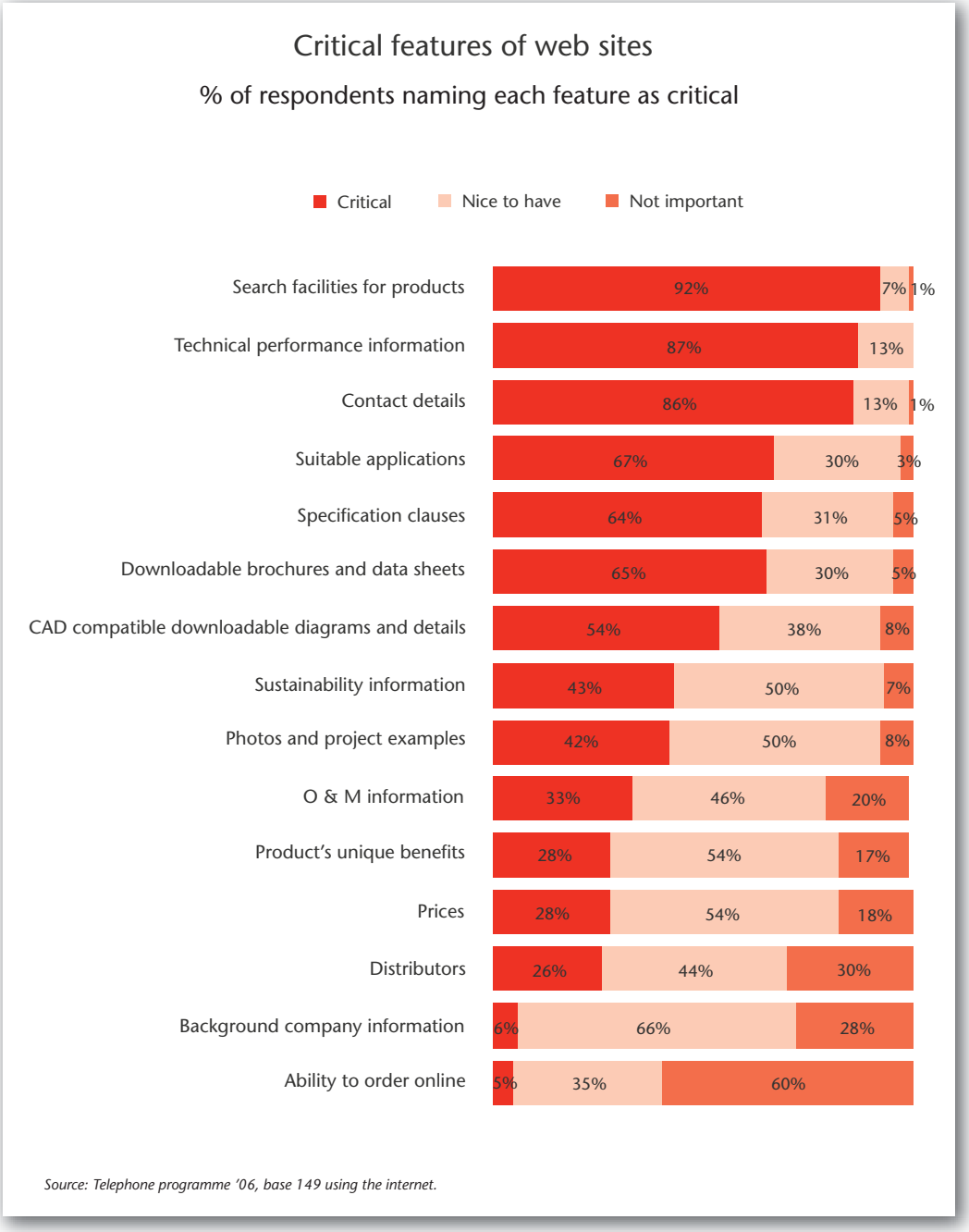
Important features of web sites
Critical and nice to have features

	Clients		Specifiers		Contractors	
	Critical	Nice to have	Critical	Nice to have	Critical	Nice to have
Search facilities to find products	93%	7%	90%	8%	94%	4%
Technical performance information	90%	10%	90%	10%	80%	20%
Contact details	83%	14%	83%	16%	90%	10%
Suitable applications	61%	30%	68%	31%	69%	29%
Specification clauses	59%	34%	69%	28%	59%	33%
Downloadable brochures and data sheets	52%	34%	69%	25%	65%	35%
CAD compatible downloadable diagrams and details	52%	34%	54%	41%	57%	37%
Sustainability information	45%	38%	48%	47%	36%	61%
Photos and project examples	45%	45%	48%	44%	33%	61%
O&M information	31%	48%	30%	44%	39%	49%
Product's unique benefits	31%	41%	25%	54%	31%	61%
Prices	28%	48%	20%	64%	39%	43%
Distributors	34%	41%	16%	42%	37%	49%
Background company information	10%	69%	3%	65%	8%	65%
Ability to order online	0%	31%	4%	25%	10%	51%

Source: Telephone programme '06, base 149 using the internet.
Balance to 100% in each respondent group = 'not important'.

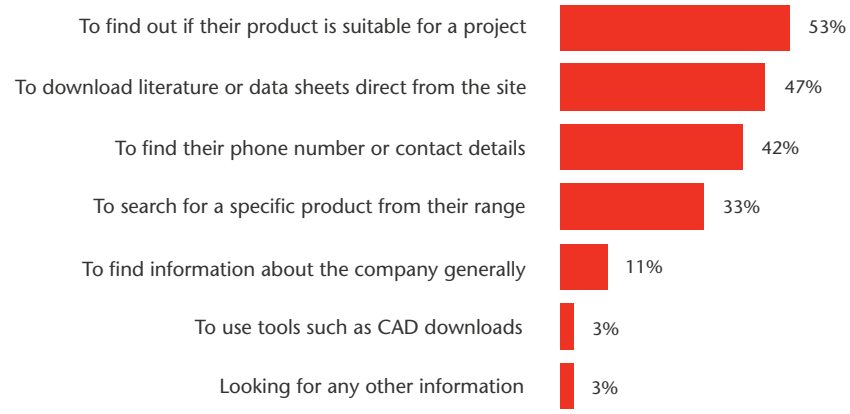
7.2 Required features of manufacturers' web sites

Search facilities, technical information and contact details are the three most critical features of manufacturers' web sites and are the main drivers for Specifiers using them. These remain the same as identified in the 2001 and 2002 Barbour Reports.



Source: Telephone programme '06, base 149 using the internet.

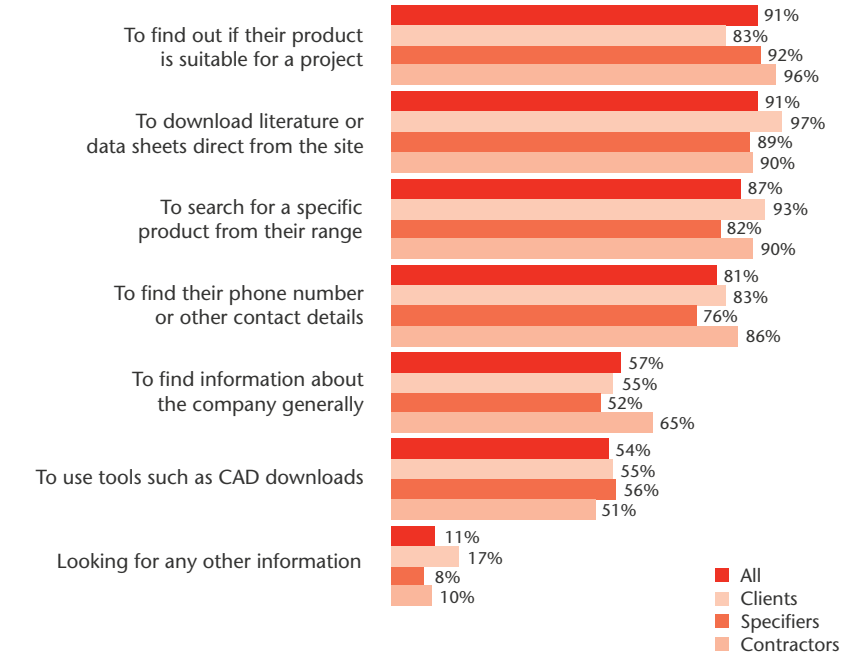
Main reasons for using a manufacturer's web site



Source: Telephone and web programmes combined '06, base 294 using the internet.
Two main reasons asked for, hence adds to over 100%.

When asked to give all possible reasons why they might refer to a manufacturer's web site, again the importance of the same features emerged. Using CAD downloads and general company information are secondary benefits highlighted by all professions.

All reasons (main and secondary) for using a manufacturer's web site



Source: Telephone programme '06, base 149 using the internet.

'Other' includes photos, specification clauses, cost information, construction details and information on local suppliers.

7. Manufacturers' web sites

- **The three main drivers to using a manufacturers' web site are to establish a product's suitability, to download literature and for contact details.**
- **The most critical features of a web site are its product search facility, technical information and contact details.**
- **The area most in need of improvement is the search facility.**
- **Compared with 2002, a slightly higher percentage of product decision-makers are unhappy with the search facilities on sites (30% in 2006 compared with 25% in 2002). This may in part be due to raised expectations as technology has improved.**
- **Compared with 2004, satisfaction with technical information on sites has improved significantly.**
- **40% of users are deterred by a web site that has a log-in request.**
- **One-third of respondents will refer to a competitor's web site if they cannot find what they want.**
- **Having used a web site, the most common actions taken next are to print out information and to contact the manufacturer by phone.**
- **The percentage likely to make direct contact with manufacturers as a result of using a site is high, which will be welcome news for manufacturers.**

7.1 Drivers to using a manufacturers' web site

The main reasons given for referring to a web site are:

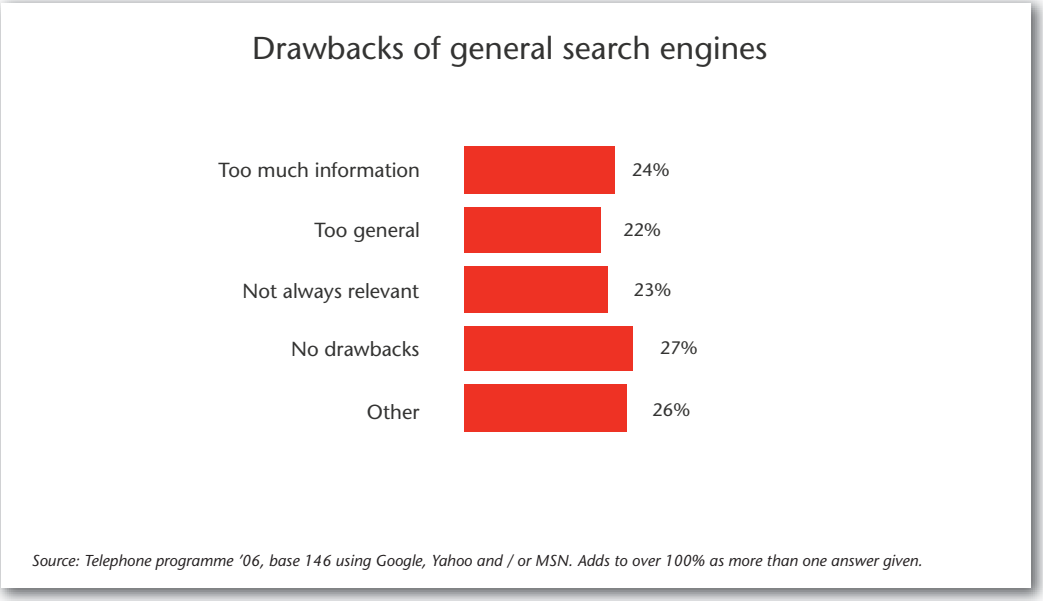
- To establish the product's suitability for the application.
- To download literature.
- To find a phone number.
- To search for a specific product from a given range.

This year's research has highlighted that the information has remained broadly the same as in the 2001 and 2002 Barbour Reports.

Manufacturers should therefore continue to ensure that their web sites are designed to easily and quickly meet these four requirements as a matter of priority.

Using CAD downloads appears to be the least common driver to use a web site. This feature is more likely to be a secondary benefit and is regarded as important, but is not a main driver.

Those using Google, Yahoo or MSN were asked what they regard as the drawbacks of these search engines when looking for building product information. Common problems included 'too much information' and 'too general'.



Source: Telephone programme '06, base 146 using Google, Yahoo and / or MSN. Adds to over 100% as more than one answer given.

When a search is generated, 14% would not normally go beyond page 1 and a further 42% would usually stop at page 2 (and a further 15% said it varies). This again emphasises the importance for manufacturers to have a presence on the first two pages of a web search at least.

Almost half of those questioned believe there is a need for a better construction industry search facility:

Is there a need for a better construction industry search facility for products?

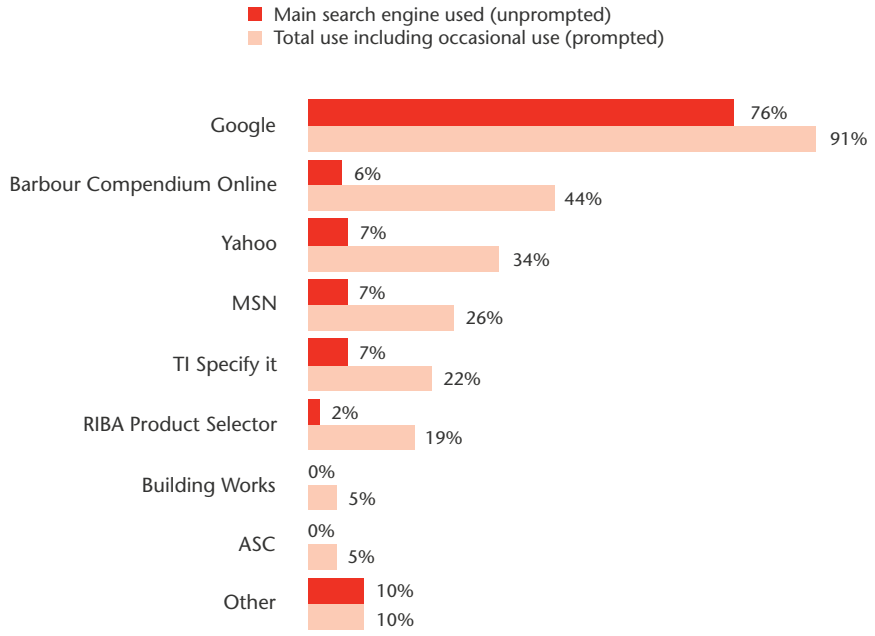
	Overall	Client	House-builder	Architect	Building Services Engineer	Building Surveyor	Main Contractor	Sub-Contractor
Yes	45%	56%	65%	48%	57%	63%	40%	45%

Source: Telephone and web programme combined, base 294 using the internet.

Barbour has taken these findings on board and is currently developing an enhanced search facility for the construction industry.

The main search engine used by 76% for searching for company and product information is Google. 44% use Barbour Compendium Online at some time for sourcing product information.

Search engines used

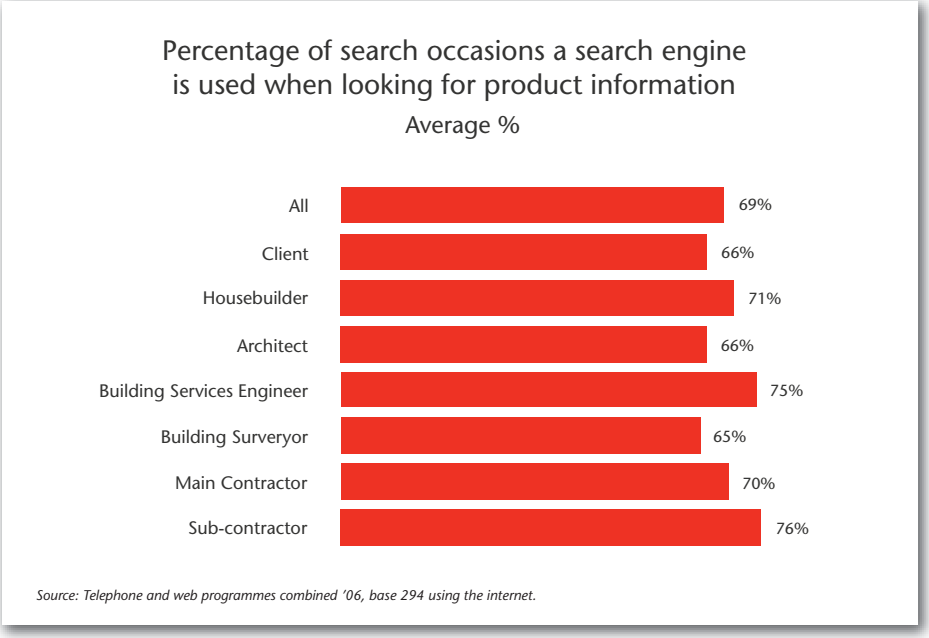


Source: Telephone and web programmes combined '06, base 294 using the internet.
Other includes Yell.com (7 respondents), Ask Jeeves (6), CIS (3), AOL (2), Alta Vista (2), Lycos (2), Opus (2), company intranet (4).
Barbour Compendium Online formerly called Building Product Expert.

6.3 Searching for information

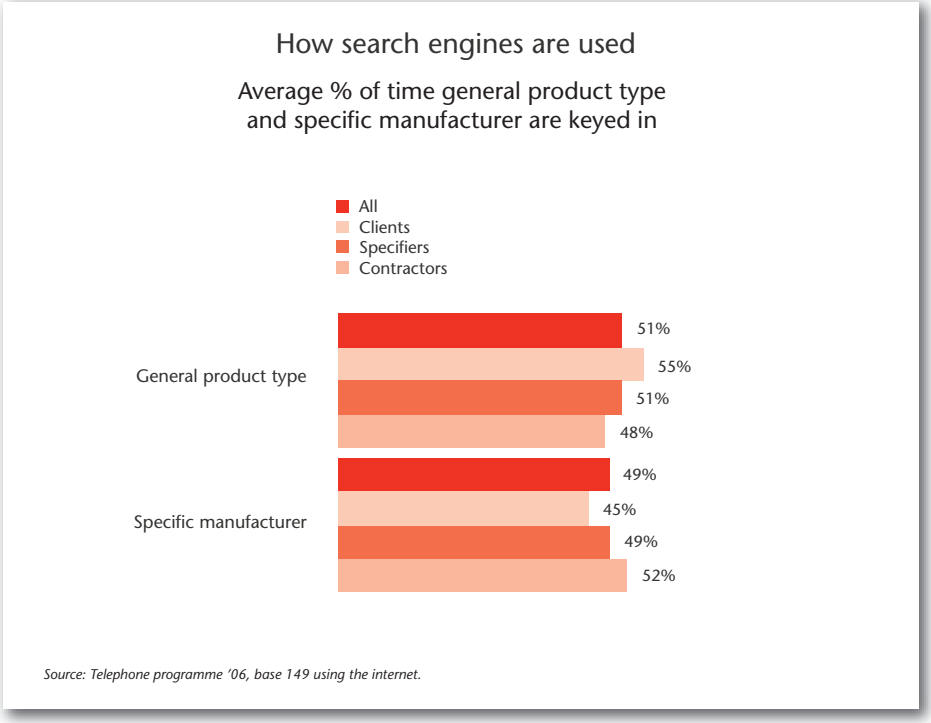
The results in the previous section show that product decision-makers use the internet first as their main source to locate companies and products. To ensure manufacturers' web sites can be found, it is important to understand the methods used by specifiers to arrive at them. Manufacturers' web sites need to be registered with search engines and their web address promoted in order to attract traffic and to gain a presence on web search results.

Respondents were asked how they searched for information on the internet. It was identified that search engines are popularly used when searching the internet for product information on 69% of occasions.



Source: Telephone and web programmes combined '06, base 294 using the internet.

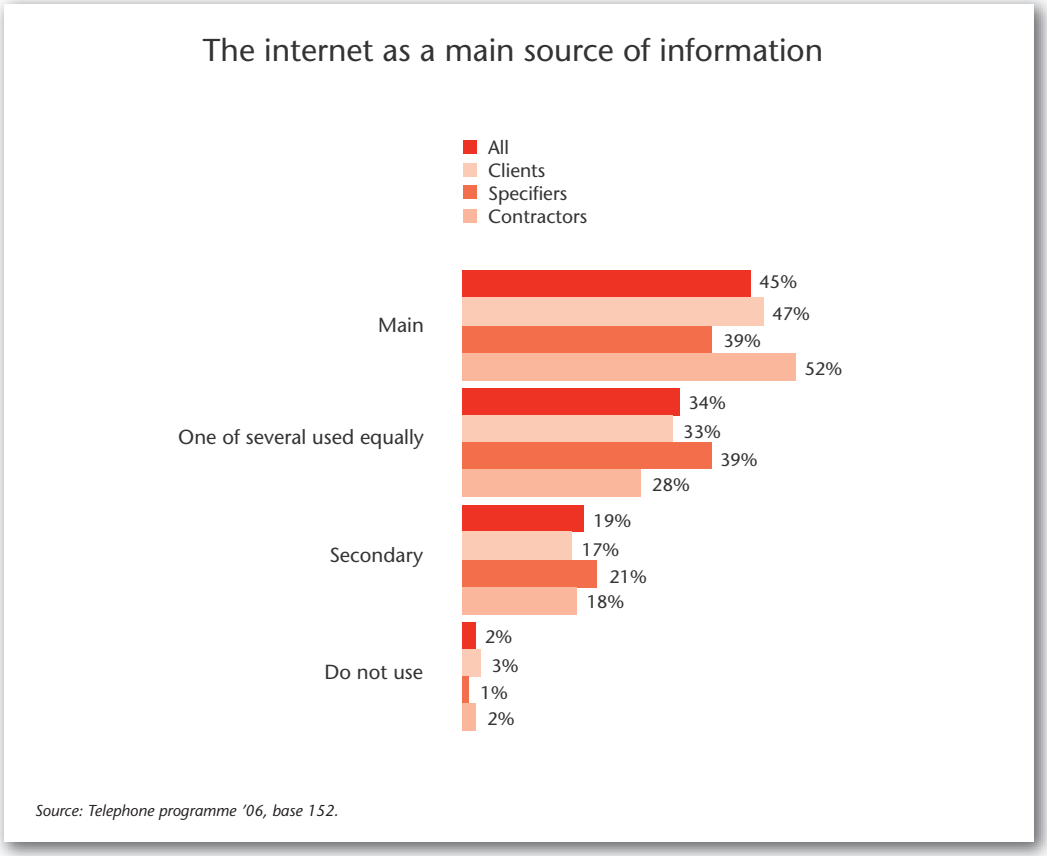
When a search engine is used, half the time users key in a general product type, and half the time a specific manufacturer.



Source: Telephone programme '06, base 149 using the internet.

6.2 The internet as a main source of information

It is clear that the internet has become a main source of product information with 45% stating it is their main reference point, and a further 34% using it equally with other sources.



Source: Telephone programme '06, base 152.

Analysis by age of respondent shows that those aged 35 and under are more likely to use the internet, particularly when researching companies from scratch. A high percentage of all age groups have however, adopted the internet for sourcing information.

Use of the internet by age of respondent

	Overall (150)	Up to 35 (36)	36 – 45 (61)	46 – 55 (30)	56 and over (23)
Use of internet when looking for information on known companies	63%	58%	66%	60%	61%
Use of the internet when researching companies from scratch	71%	86%	67%	70%	57%
Use of internet as main source of product information	45%	56%	39%	43%	43%

Source: Telephone programme '06. 2 did not give age.

Note that 2% of the 152 interviewed by telephone do not use the internet. These 3 respondents were not asked further questions. Therefore the results in the following sections about the use of the internet are based on 149 internet users, or 294 when combined with the web survey.

6. Use of the internet

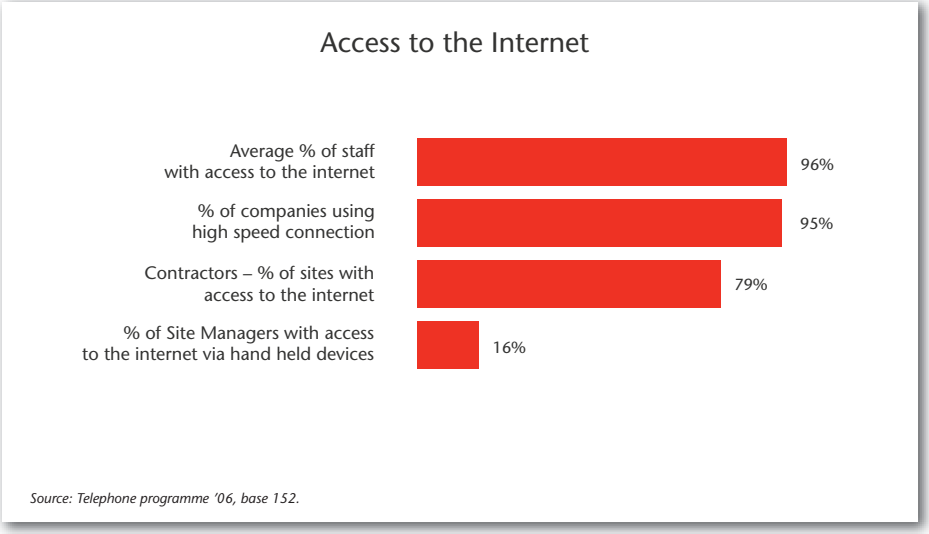
- **Virtually all professional staff in the companies interviewed (i.e. mainly large and medium sized) have access to the internet.**
- **95% of all professionals use a high-speed connection.**
- **79% of construction sites have access to the internet compared with just 17% in 2001.**
- **71% use the web when researching companies from scratch.**
- **45% of respondents use the internet as their main source of product information.**
- **34% of respondents use the internet as one of several equally important primary sources.**
- **Those respondents aged 35 and under are more likely to use the internet as a main source and when researching a product from scratch.**
- **On 69% of occasions a search engine is used when sourcing product information online.**
- **The main search engine, used by 76%, is Google.**
- **44% of respondents use Barbour Compendium Online (formerly Building Product Expert).**
- **General search engines are considered to generate too much information which is not always relevant.**
- **42% of professionals go no further than the second page in a web search.**
- **45% of professionals think there is a need for a better construction industry search facility for products.**

6.1 Access to the internet

The pattern of use and access to the internet over the last five years continues to grow. On average across all the companies and practices interviewed, 96% of technical and professional staff have access to the internet. Results show that only 12% of companies provide internet access to less than 100% of their staff.

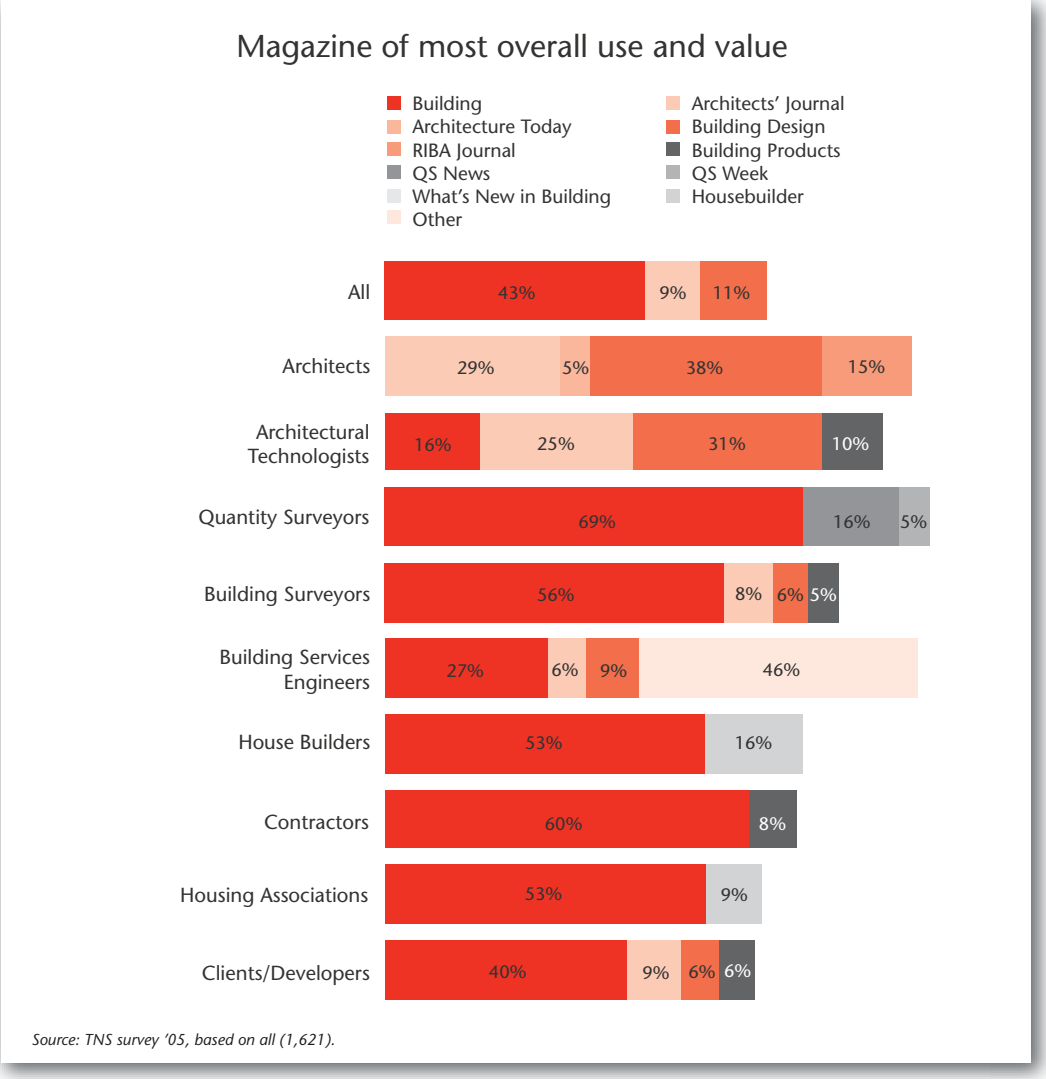
High speed connection to the internet is very common. With 69% using a high speed connection in 2002 compared to 95% in 2006 - the issue of download speed is considered a thing of the past.

Respondents representing Contractors were asked whether their company's construction sites have internet access. 79% answered that they were able to access the internet, although the use of hand held devices is low. This is a remarkable increase from the 17% of sites reported to have internet access in 2001 (source: The 2001 Barbour Report).



5.9 Most useful trade journals

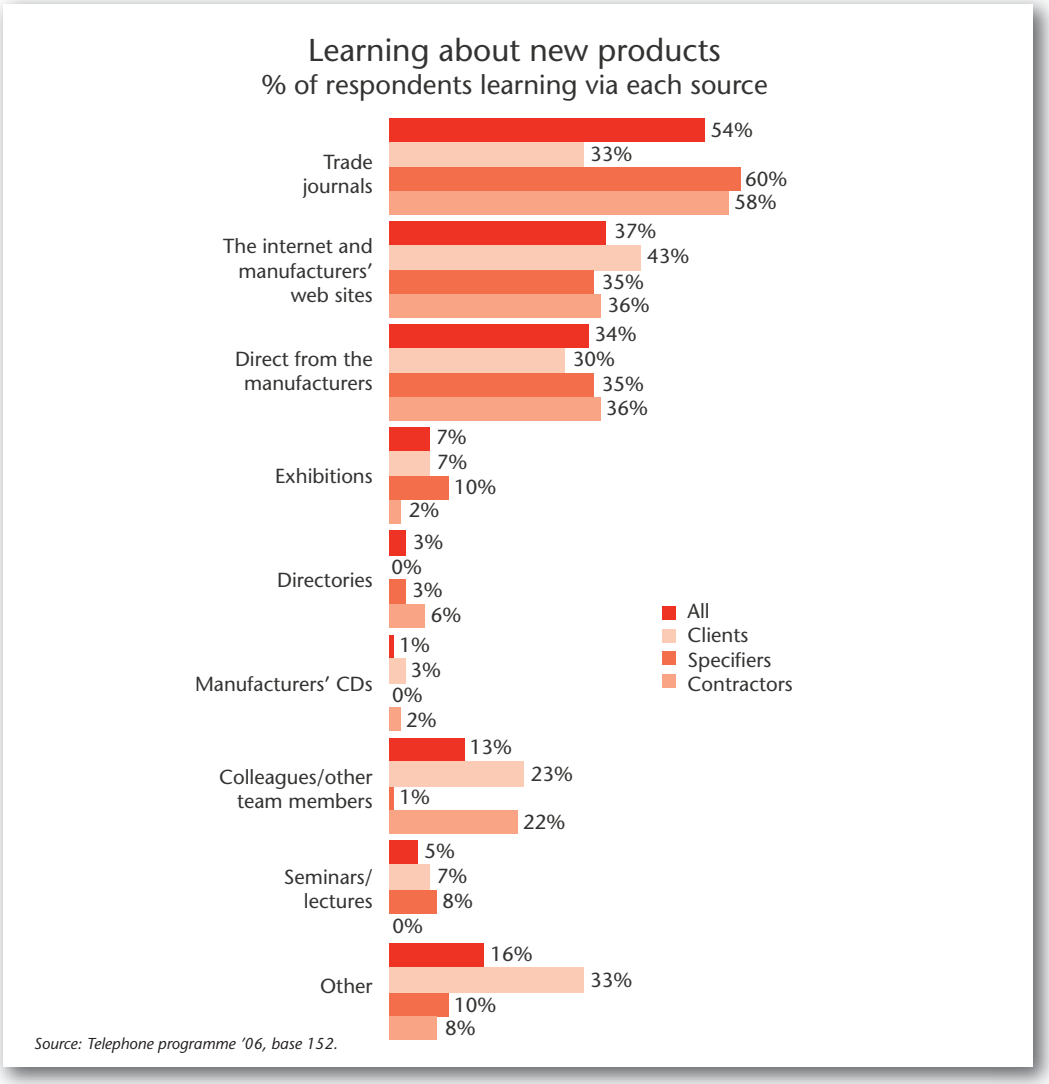
Trade journals are not used as a reference source, but rather they inform about new and innovative products. The 2005 TNS survey illustrates the most commonly used trade journals.



Source: TNS survey '05, based on all (1,621).

5.8 Information on new and innovative products

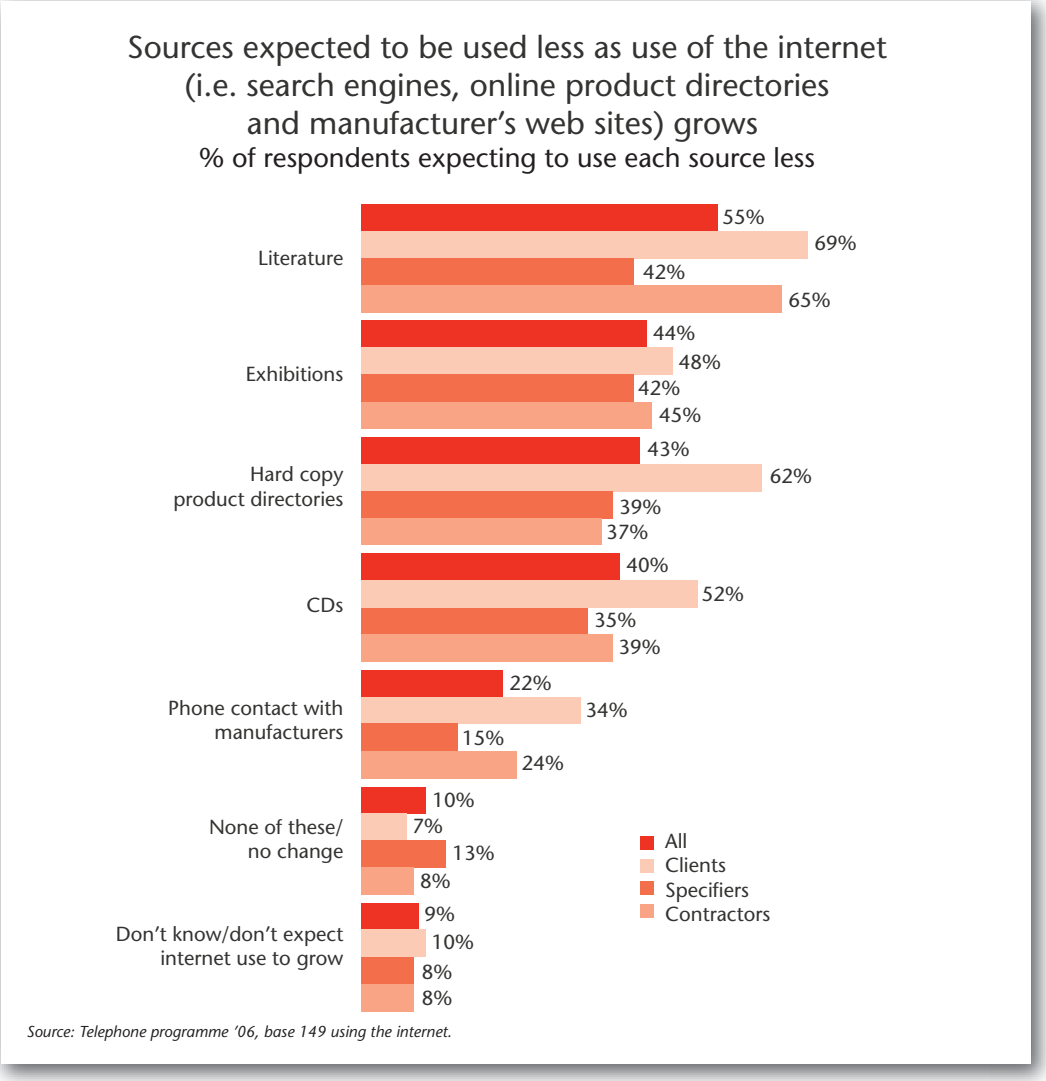
Previous research and experience has shown that information on new products is obtained via different sources. Learning about new products is a passive rather than active 'action' and the main source is trade journals.



Source: Telephone programme '06, base 152.

The pattern for the future suggests that the use of all non-online sources is expected to continue to decline, particularly for product literature. Only 9% do not expect their use of the internet to grow.

Client companies in particular see their use of non-online sources declining whilst Specifiers do not see as great a reduction.

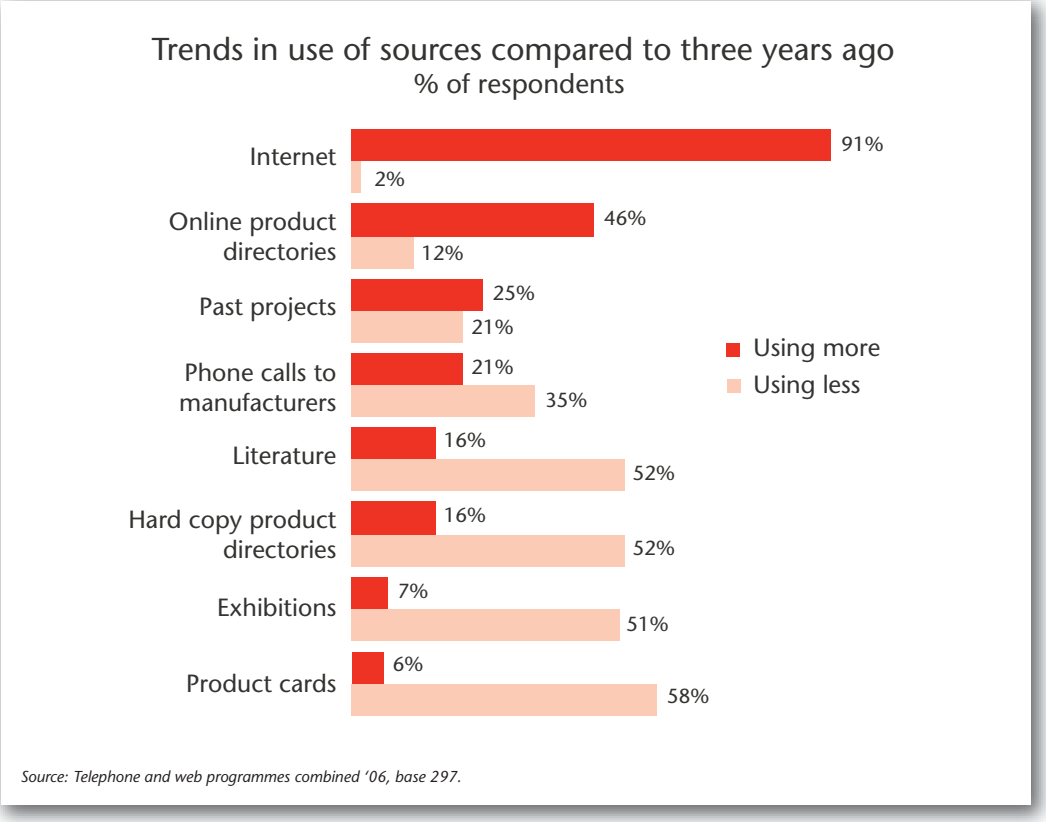


Source: Telephone programme '06, base 149 using the internet.

5.7 Trends

The 2001 Barbour Report identified that respondents expected their use of web sites for product information to grow over the next two years, which is demonstrated in the 2006 research results. Information sources that are used more now than 3 years ago are the internet and online product directories.

The main reason given for a decline in hard copy reference sources is the increase in use of the internet. With high speed internet connections now commonly used by 95% respondents (discussed in section 6), it has allowed access to information to become even faster, providing additional information, which is also believed to be more up-to-date.



Source: Telephone and web programmes combined '06, base 297.

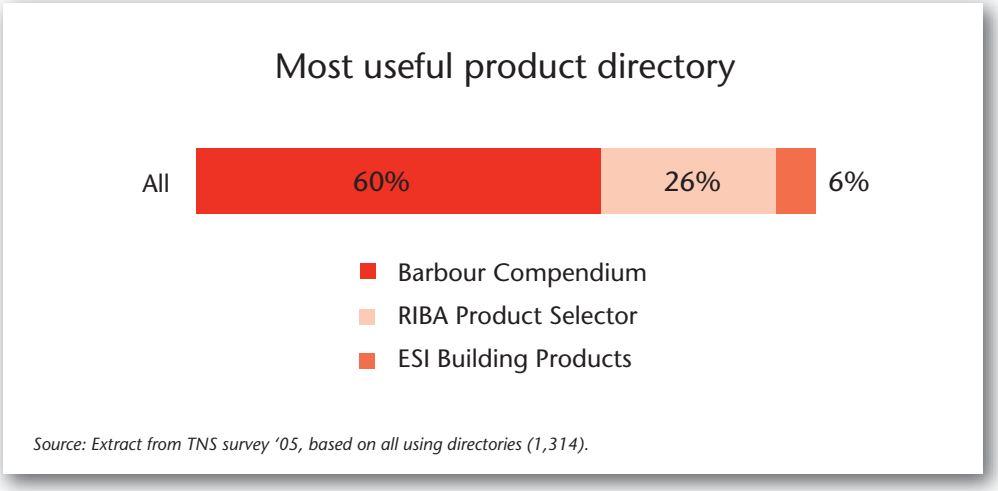
Main sources used for product information
% of respondents using each as one of their 3 most used sources

	Overall	Client	House-builder	Architect	Building Services Engineer	Building Surveyor	Main Contractor	Sub-contractor
Internet	82%	78%	87%	75%	90%	100%	84%	82%
Literature	54%	28%	47%	64%	60%	50%	46%	54%
Product directories in hard copy	51%	44%	50%	66%	23%	62%	42%	51%
Online product directories	34%	50%	18%	33%	30%	44%	42%	34%
Phone call or other direct contact with manufacturer	33%	50%	37%	26%	47%	25%	29%	33%
Past projects	26%	39%	26%	22%	27%	13%	36%	26%
CDs	6%	0%	16%	4%	17%	0%	3%	6%
Other	4%	11%	5%	3%	0%	0%	6%	4%

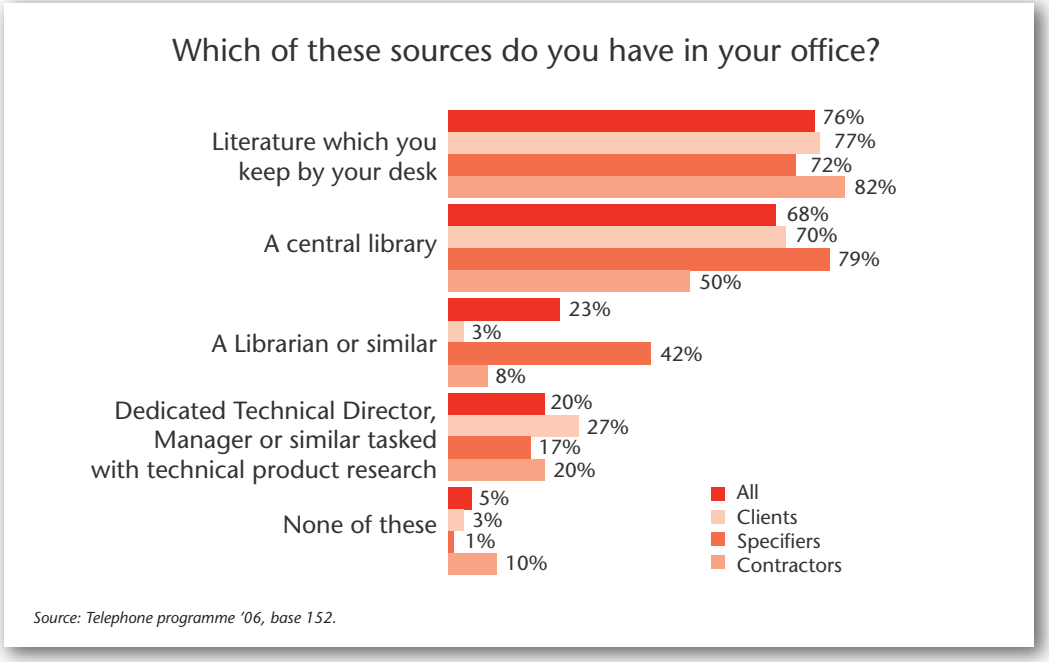
Source: Telephone and web programmes combined '06, base 297. Respondents asked to name 3 product information sources which they use most. Adds to 290% rather than 300% as some named two main sources only.

5.6 Most useful product directory

51% of respondents from the telephone and web survey combined stated that they use hard copy product directories as one of their 3 most-used information sources. The 2005 Independent TNS survey identified the Barbour Compendium as the most useful directory across all product decision-making groups.



Source: Extract from TNS survey '05, based on all using directories (1,314).

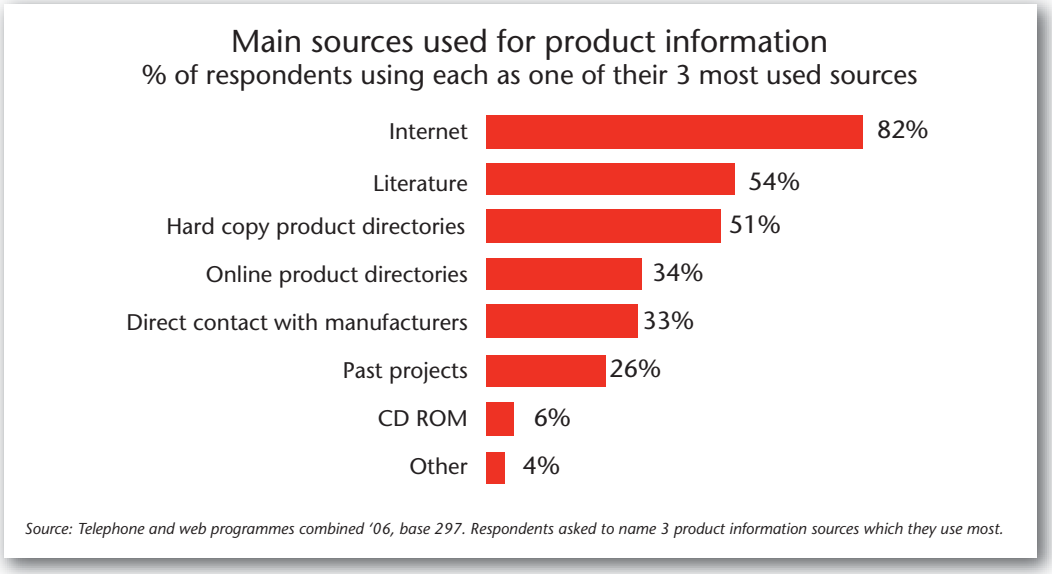


Source: Telephone programme '06, base 152.

5.5 Most used product information sources

When asked to name three sources respondents use most when looking for product information, 82% included the internet in their top 3 (i.e. search engines such as Google). 51% of all product decision-makers gave hard copy product directories as a main information source. These results demonstrate that internet use has increased rapidly in the last 4 years; in the 2002 Barbour Report, only 23% of a similar sample used the internet as a first or secondary source when looking for products to meet specific criteria.

It is interesting to note that CD ROMs are now used by only 6% as a main source, which is a decline from the 2002 Barbour Report findings.



Source: Telephone and web programmes combined '06, base 297. Respondents asked to name 3 product information sources which they use most.

5.3 Information sources used first when researching products from scratch

When researching products from scratch, the internet is again the most used - with 56% turning to this source first. 41% of Architects and 31% overall use hard copy product directories, which are also important in this type of search.

Information sources used first when the company name is not known by respondent type

	Overall	Client	House-builder	Architect	Building Services Engineer	Building Surveyor	Main Contractor	Sub-contractor
The internet	56%	50%	66%	45%	67%	69%	64%	55%
Product directories in hard copy	31%	39%	24%	41%	10%	38%	28%	20%
Online product directories	14%	22%	8%	15%	17%	25%	10%	10%
Literature or brochures /library	7%	6%	3%	14%	0%	0%	4%	0%
Phone call or other direct contact with manufacturer	3%	6%	0%	2%	10%	0%	3%	0%
Past projects	2%	0%	0%	3%	0%	0%	3%	0%
CDs	0%	0%	3%	0%	0%	0%	0%	0%
Other	7%	22%	3%	6%	3%	0%	10%	15%

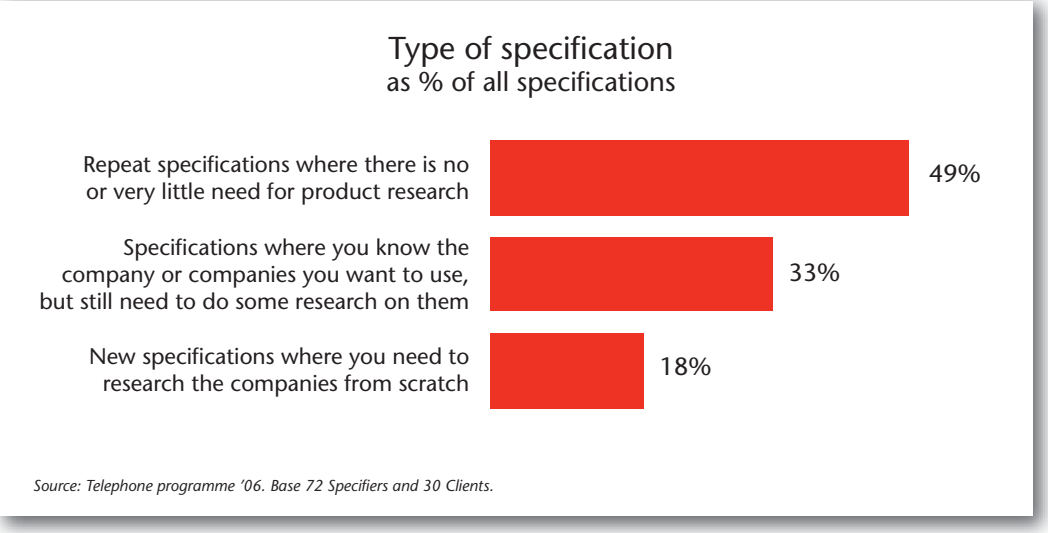
Source: Telephone and web programmes combined '06, base 297. Adds to over 100% as some respondents gave more than one answer. Other includes asking colleagues, company database or intranet and seeking advice from sub-contractors or other team members.

5.4 Libraries and other in-house resources

Although the internet is the first reference source for over half of all decision-makers, 68% retain in-house libraries, and 76% keep literature by their desks - often their favourite and most frequently used brochures. This point was also raised in the focus groups, with many stating that their libraries have been reduced to a collection of preferred literature rather than being comprehensive. 42% of specifying practices have a Librarian who could be asked to research products.

The telephone research identified that product research takes place in the preparation of 51% of specifications, whilst the remainder are repeat specifications with no or little need for research of this type.

In 33% of specifications, whilst Specifiers know the companies they wish to use, they still carry out some research on them.



5.2 Information sources used first where companies are known

Having identified the proportion of specifications that require research into a product or company, how do product manufacturers ensure Specifiers find their products?

Respondents were asked in the telephone and web survey, 'when a Specifier or other decision-maker knows the company or companies they wish to use, but still needs to do some research on their products and suitability, where does he or she turn first for this information?'

Where the company is known, the internet is the most popular first point of reference used by 50% of Architects, 67% of Main Contractors and 39% of Clients.

Information sources used first when the company or companies are known by respondent type

	Overall	Client	House-builder	Architect	Building Services Engineer	Building Surveyor	Main Contractor	Sub-contractor
The internet	57%	39%	61%	50%	47%	62%	67%	70%
Literature or brochures/library	21%	17%	16%	26%	23%	25%	13%	10%
Product directories in hard copy	18%	17%	21%	25%	13%	19%	12%	5%
Phone call or other direct contact with manufacturer	10%	28%	8%	8%	27%	0%	6%	15%
Online product directories	9%	22%	8%	12%	7%	0%	6%	0%
Past projects	4%	11%	3%	2%	0%	6%	7%	0%
CDs	2%	0%	3%	1%	3%	6%	0%	5%
Other	5%	17%	0%	1%	0%	6%	12%	5%

Source: Telephone and web programmes combined '06, base 297. Adds to over 100% as some respondents gave more than one answer. Other includes asking colleagues, company database or intranet and seeking advice from sub-contractors or other team members.

5. Product information search

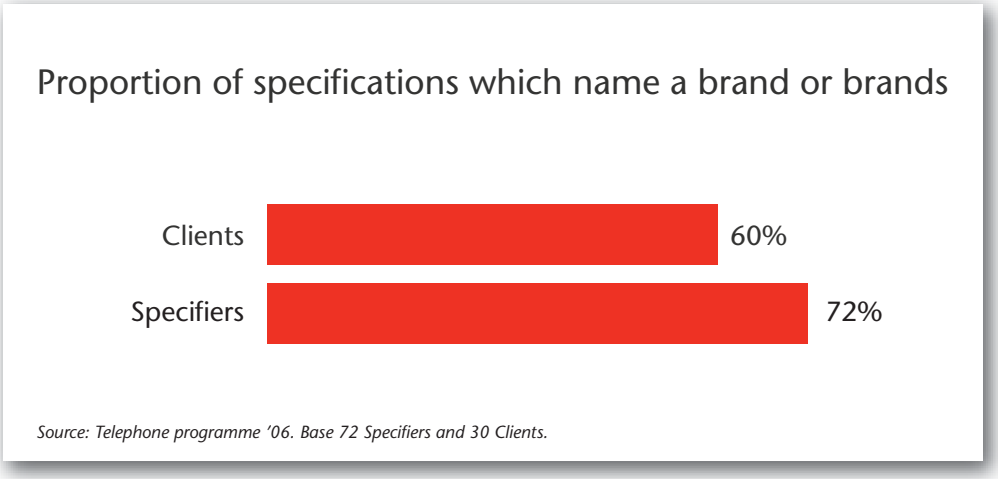
- **In total, product research takes place in the preparation of 51% of specifications.**
- **On average, Specifiers estimate that they name a brand/s in 72% of their specifications.**
- **Half of all specifications are a repeat of a previous specification.**
- **In 33% of specifications, whilst Specifiers know the companies they wish to use, they still carry out some research on them.**
- **91% of respondents use the internet more now than 3 years ago.**
- **Specifiers carry out research from scratch in 18% of cases.**
- **When researching products from scratch, the first points of reference are the internet and hard copy directories.**
- **68% of practices retain in-house libraries and 42% of the specifying practices interviewed have a Librarian.**
- **Trade journals are the main information source for learning about new products.**

5.1 Specifications and the need for product research

Specifiers use and research product information using a number of different methods, whether they are looking for repeat specifications, brands or companies. Understanding the information sources specifiers use to arrive at a decision to use a product, helps manufacturers ensure that they have a good presence when specifiers make this choice.

Specifiers have been identified, in section 4, as the main party in choice of product brand. Their influence is investigated in more depth in this section through examining how this group specifies products.

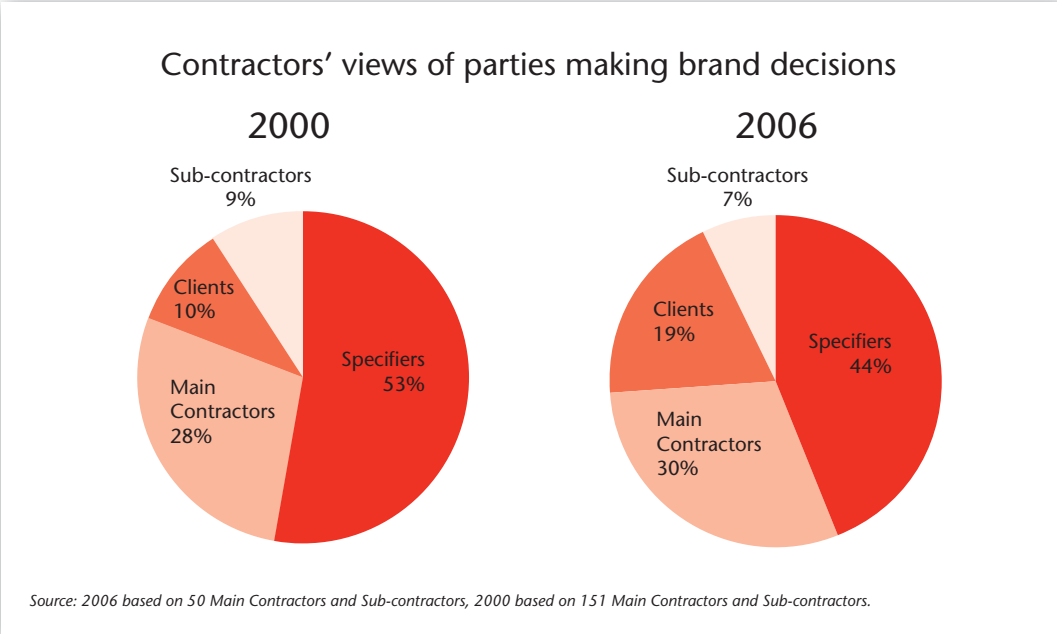
The extent to which Specifiers name brands in their specifications indicates the need to understand how they make this brand decision. Specifiers on average name a brand or brands in 72% of their specifications. Clients (large Housebuilders, Developers and repeat Clients) name a brand or brands in 60% of specifications.



Source: Telephone programme '06. Base 72 Specifiers and 30 Clients.

In arriving at a decision about the brand to use, Specifiers and Clients may return to a specification that they have used successfully before. It was mentioned in the focus group, 'why reinvent the wheel?' However some respondents in the group said they discourage this practice, preferring each situation to be assessed to ensure the specification is up-to-date. Information on products used is shared within practices, but half of the group admitted that feedback is not collected in a formal manner. Therefore, manufacturers cannot expect all Specifiers in a practice to use a product just because one Architect has done so, and consequently marketing to several people in each practice is important.

In the 2000 Barbour Report, Contractors were asked a similar question to the one in this year's report. Given their pivotal role in the construction process, Contractors may be expected to have a good overview of product decisions. Comparing their answers in 2006 with 2000, it can be seen that in their view, Specifiers now make fewer product decisions, while Clients are more involved, and the role of Main Contractors and Sub-contractors in product choice remains largely similar.



Source: 2006 based on 50 Main Contractors and Sub-contractors, 2000 based on 151 Main Contractors and Sub-contractors.

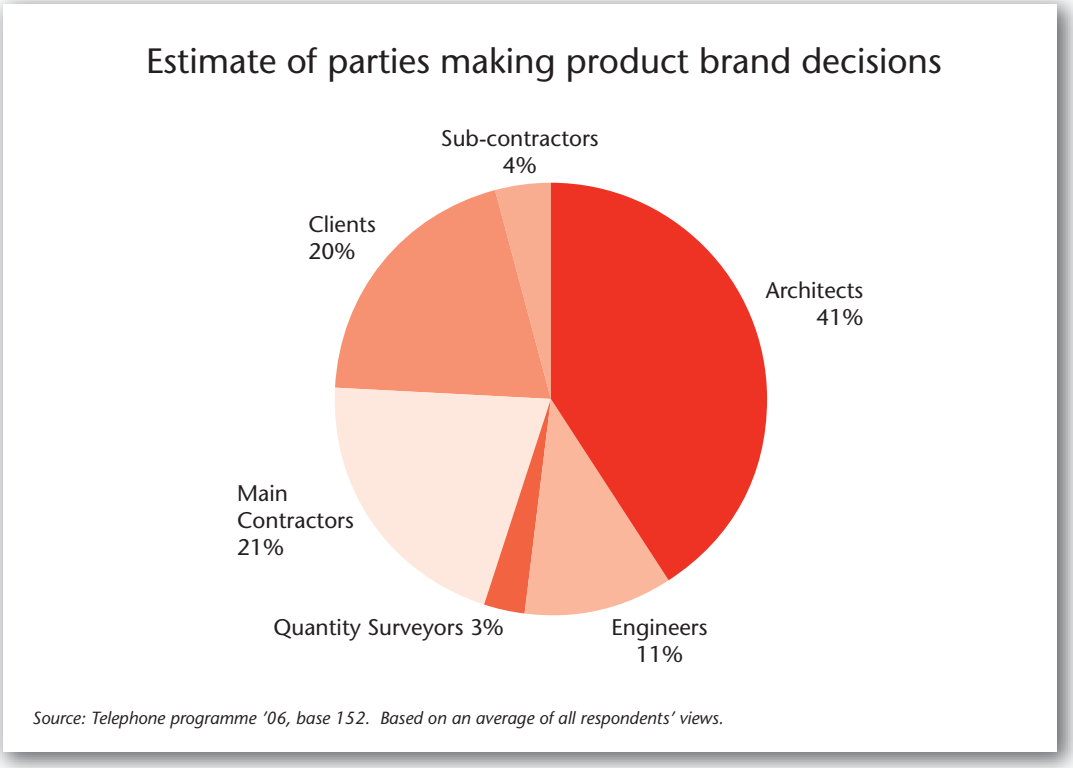
4. Trends in product brand decision-making

- **Specifiers, particularly Architects, remain the most influential party responsible for product brand decisions, followed by Main Contractors.**
- **Comparing results with the 2000 Barbour Report, Main Contractors believe the role of Specifiers has declined while that of Clients has grown.**
- **Main Contractors estimate that their involvement in product decisions is much the same now as it was 6 years ago, namely that they make 30% of product brand decisions and Sub-contractors choose 7% of brands.**

In the 2004 Barbour Report, Main Contractors were asked a series of questions about who makes product recommendations, whether changes are suggested and by whom, each in relation to the building area in the specification. For example, in the 2004 research, with regard to the External Envelope, an Architect was estimated to have made the initial product recommendations in 57% of projects, and in 41% the Main Contractor suggested a change. In 80% of cases, Main Contractors succeeded in making the changes they suggested.

This year's report seeks to identify who makes product decisions, how product information is sourced and used to ensure that manufacturers' promotional budgets are used most effectively. Trends can be identified by comparing this report to previous Barbour Reports over the past few years.

To quantify who is actually making product decisions, for the 2006 report, all respondents in the telephone survey were asked to estimate the proportion of brand decisions made by each party. This shows that Specifiers (which encompasses Architects and Engineers) make just over half of product brand decisions and remain the single most influential party on product choice. Since this question was asked about the products actually installed on a recent project, it includes any changes Specifiers or others were aware of being made at the construction stage.



Source: Telephone programme '06, base 152. Based on an average of all respondents' views.

Web survey and total numbers interviewed

	Responses to web survey	Total number of interviews with telephone survey
Clients	3	18
Housebuilders	23	38
Architects	54	105
Building Services Engineers	14	30
Building Surveyors	11	16
Main Contractors	29	69
Sub-contractors	10	20
Total	145*	297*

** Note that one respondent in the web survey did not give their profession and is included in the total only.*

Where results are based on the telephone programme, they are shown by category: Clients, Specifiers and Contractors. Where results are based on the telephone interviews plus web survey combined, they are given by profession, as the larger numbers allow this.

TNS Survey: 'The Building Industry – A study of product decision making, information sources and readership'

This study, independently carried out by TNS in 2005, is a follow up to the 2002 independent research by NOP to establish whether the building industry has changed its readership and product information sourcing habits. Independent research was conducted by TNS with 1,621 product decision-makers including Architects, Engineers, Contractors and major Clients. Respondents to the survey had to be currently employed, spend at least 75% of their time working on building projects, and be involved in projects with a value of £500,000 or more in the previous 12 months. Where relevant, these results are included in this report.

Previous Barbour Reports

The topics for the Barbour Research Reports focus on defining product selection and information requirements. They identify trends in the Construction Industry and many issues identified in earlier reports remain relevant today. Since 1993, Barbour has commissioned some 5,000 in-depth interviews and analysed over 65,000 detailed questionnaire responses from industry professionals in the preparation for these reports.

Results of this year's research have been compared with results in previous Barbour Reports where relevant.

The Barbour Report series consists of the following titles:

2004 Influencing Contractors -The importance of Main and Specialist Contractors in Product Selection

2003 Influencing Clients - The Importance of the Client in Product Selection

2002 Exploring the Web as an Information Tool

2001 Construction Product Information - Delivery Preferences and Trends

2000 Influencing Product Decisions

1999 The Sourcing and Exchange of Information

1998 The Building Maintenance and Refurbishment Market

1997 Electronic Delivery of Product Information

1996 Communicating with Construction Customers

1995 The Influence of Clients on Product Decisions

1994 Contractors' Influence on Product Decisions

1993 The Changing Face of Specification

Copies of reports in this series are available from Barbour. For more information, visit Barbour's web site: www.barbour.info

3. Research sources

A number of research sources have been used in compiling this report. These include a focus group, a programme of telephone interviews and a web survey.

Focus group

A group of 11 professionals from leading Architectural, Multi-disciplinary, Engineering and Surveying practices, met to discuss the merits of different media for the delivery of product information. The primary focus was on the use of the internet. Also debated was how other forms of information are used. Shortcomings of the internet and developments were discussed in what proved to be a lively debate. Issues arising from the group were incorporated into the questions for the main telephone interview programme.

In-depth telephone interviews

The main programme of in-depth telephone interviews was designed to include a sample across the range of practices and companies involved in making product decisions. The main groups and their sub-categories interviewed included:

Clients: Leading Developers, Housebuilders and large repeat Clients, such as retail and financial.

Specifiers: Architects, Building Services Engineers and Building Surveyors.

Contractors: Main Contractors and specialist Sub-contractors. In the latter category, Sub-contractor types were chosen that are known to be involved in making or influencing product decisions and included Building Services, Flooring and Roofing Contractors.

152 telephone interviews were conducted with an average duration of 30 minutes. Care was taken to include mainly large companies and practices in each category. For example, amongst Specifiers, 96% of practices interviewed have more than 5 professional staff at their location.

The Barbour Report 2006 telephone interview programme

	Respondent types	Number of interviews
Clients	Developers, major repeat clients	15
	Housebuilders	15
	Total	30
Specifiers (private practices)	Architects	51
	Building Services Engineers	16
	Building Surveyors	5
	Total	72
Contractors	Main Contractors	40
	Sub-contractors	10
	Total	50
Total no. of interviews		152

Web survey

A link to a web-based survey, containing some of the key questions from the telephone programme, was sent to over 2,500 Specifiers, Clients and Contractors. The sample was randomly sourced from independent lists and care was taken to ensure major organisations were included. 145 questionnaires were completed - a response of 6%, which by industry standards is good for a survey of this type. Results have been incorporated with those of the telephone programme where applicable.

Future requirements of online delivery

- Users want the next generation of web sites to be easier to use, rather than offering advanced technical features. Better use of home pages is also a requirement.
- Features which would be of interest are those which replicate how literature is used, for example the ability to compare web sites side by side and to bookmark pages. A greater use of calculation tools would also be attractive.
- Online videos are not considered to be useful by many of the web users interviewed. However there is a trend across other industries to use these techniques, and the construction industry could consider online videos for the demonstration of product benefits, features and installation.
- Just under half would find e-broadcasts from known manufacturers to be acceptable, a more attractive alternative to direct mail.

2. Report highlights

Trends in product decision-making

- Architects continue to be the single most influential party responsible for product brand decisions, followed by Main Contractors.
- The involvement of Specifiers in product decision-making has declined over the last 6 years, since last measured in a Barbour Report, while Clients have become more involved in selecting products.

Product information search

- Product research takes place in the preparation of 51% of specifications. The remaining 49% are a repeat of a previously used specification, where there is no or very little need for research.
- 82% name the internet as one of their top 3 information sources. The internet is the first source used by 57% of product decision-makers when researching products for specifications.
- After the internet, hard copy product directories and literature are the next most popular sources of information.
- Demonstrating the continued importance of hard copy, in spite of significant use of the internet for product information, 68% of the specifying practices interviewed have in-house libraries and 42% have a Librarian.
- The main means of learning about new products is trade journals.

Accessing the internet

- 96% of technical staff in the companies interviewed have access to the internet and 95% have a high speed connection.
- 79% of building sites have internet connections compared with 17% in 2001.
- Analysis by age of respondent shows that those under 35 are more likely to use the internet, but a high percentage of all age groups use it.
- On 69% of occasions that the internet is accessed, a search engine is used.
- Google is the main search engine, with 76% describing it as the one they use most. However, Google and other general search engines suffer the problem of generating too much information of a general nature.
- Almost half believe there is a need for a better construction industry search facility.

Manufacturers' web sites

- The three main drivers to seek out a manufacturer's web site are; to establish a product's suitability, to download literature and for contact details. It therefore follows that the three features regarded as most critical are search facilities, technical information and contact details.
- The search facilities on manufacturers' sites are considered to be most in need of improvement, although there is evidence of an increase in users' ability to find information on web sites.
- Satisfaction with the technical content of sites has improved since the last Barbour Report on this subject in 2002.
- 43% could not name a manufacturer's site which they consider to be particularly good.
- One feature likely to deter use is a log-in request.
- The most likely next actions having used a site are to print out information and to contact the manufacturer by phone. The main reasons for making direct contact are for additional technical information and to discuss the product's suitability for the proposed project.

Internet versus hard copy delivery

- In spite of high use of the internet, 54% still want hard copy literature from manufacturers, even if web sites were to be improved. It is the visual quality of literature plus the physical properties of being able to flick through it, show it to clients and carry it around which continue to make hard copy attractive.
- The internet has a role to play in literature delivery, with 80% preferring to download literature from the internet rather than contacting the manufacturer to request a copy.

1. Introduction

Sara Creech, Director, Barbour

At Barbour we are committed to understanding the information needs of UK construction professionals. The more we understand their needs, the better positioned we are to continue to serve them. Barbour services provide manufacturers with the most effective platform for accessing and influencing key decision-makers in this ever expanding market.

The Barbour Report research programme, established in 1993, is evidence of this continuing commitment. The programme investigates industry issues pertinent to manufacturers and derives the subject of the study through discussion across a section of clients, specifiers and contractors. This is research driven by the industry, for the industry.

In 2006, our objective remains - to better inform manufacturers of the needs and behaviour of specifiers, and to provide practical guidance on how to market more effectively to an increasingly diverse audience.

This year's research sought to examine and quantify the growing influence of the internet in product and brand specification. The research sought to answer the following questions:

- Who within the industry makes product decisions?
- Why and how is product information sourced?
- How do most decision-makers learn about product innovation?
- How extensively is the internet being used by product decision-makers?
- What are the benefits and drawbacks of using the internet to find products?
- What do decision-makers think of manufacturers' web sites?
- What action is a decision-maker currently likely to take having visited a manufacturer's site?

Given the broad range of products and decision-makers within the industry, answers to these questions are summarised to provide manufacturers with greater insight into how they promote their products.

Through our focus group, web survey and in-depth telephone interviews we found that clients, contractors and specifiers increasingly research and source material through deliberate, independent methods. This shifts the focus of manufacturer's marketing to a broader audience through a mix of printed directories and publications and the internet. Manufacturers who have delayed investing in a corporate web site, or entries in online directories, now do so at their peril as, increasingly, these are the decision-makers first point of call when sourcing products.

The overwhelming quantity of information online is considered a problem, and the need for a construction product portal featured strongly in the study results. Barbour is already investing significantly in the Barbour Compendium Online and its search capability to meet the requirements of the industry.

We hope that, like us, you find the research a useful insight into the specification and purchase of products and that it will help you to take practical steps in the increasingly important process of using the internet to influence decision-makers within the industry.

Barbour

Foreword

Michael G Ankers, Chief Executive, Construction Products Association

At the turn of the century, when the 'dot com' boom was at its height, there were those who believed that traditional hard copy forms of communication would disappear, and that the electronic medium would take over completely. The computer screen would dominate our lives. Whilst the potential pace of change may have been somewhat exaggerated, even the sceptics would have to admit that the last 10 years has seen a revolution in communication, the sourcing of information, and the speed with which that information can be updated. As this report highlights, 79% of construction sites have access to a computer, compared with just 17% in 2001, and 45% of specifiers now use the internet as their main source of product information.

Keeping abreast of the rapid technological changes remains a constant challenge, and one of the most significant findings of this study is that many manufacturers still have a great deal to do if their web sites are to be as user friendly as specifiers would like. Nearly half those interviewed felt that there needed to be a better construction industry search facility for products, and a slightly higher percentage than in 2002 are unhappy with search facilities on individual sites. Very helpfully, the report goes on to identify the 'do's and don'ts' that a manufacturer or supplier should consider when it comes to developing their web sites in response to these concerns.

However, now is not the time to abandon product brochures and literature. Whilst electronic sourcing of product information has grown dramatically, it is generally being seen as an additional means of identifying suitable products, rather than a complete replacement for more traditional sources. Even if manufacturers' web sites were to be improved, more than half of specifiers would still want brochures and other hard copy forms of information because these provide a much better impression of the visual impact of products.

The challenge for manufacturers and suppliers has never been greater as an increasing number of groups in the construction process have an input to product specification, and the means by which they are expected to communicate with these groups increases. Marketing departments need to be continually reviewing their strategies in response to these challenges and this report provides a valuable framework against which to develop that next strategy.

construction products association

Contents

Barbour

Barbour is the leading UK supplier of specialist information services to construction professionals, facilities managers and those responsible for health and safety at work. The company's services are available via a range of media including web, CD-ROM, hard copy and telephone.

For more than fifty years, Barbour has connected building product manufacturers with key buyers and specifiers. Services such as the Barbour Compendium, the Barbour ABI Enquiry Service and Barbour Compendium Online (formerly Building Product Expert) put manufacturers in touch with product decision-makers, providing suppliers with excellent opportunities for generating new business.

Barbour has utilised the latest technology to create seamless links between its services, forming an integrated set of working tools that give users fast and easy access to the technical and product information they require. As an example, Construction Expert and Barbour Compendium Online offer an integrated service available at the user's desktop, developed specifically to meet the needs of design professionals.

Barbour and its sister company The Builder Group are part of CMP Information, the professional media division of United Business Media plc.

The CMP Information group has a portfolio of successful products which combines leading information services, magazines, directories and exhibitions. These include Barbour ABI, Building, Building Design, Building Services Journal, Construction Manager, Interior Design Handbook, M & E: The Building Services Event, Building Services Design File OPUS, RIBA Journal, Safety & Health Expo, The Safety & Health Practitioner (SHP), and What's New in Building. For more information, visit the CMPi website: www.cmpi.biz.

Lychgate Projects Ltd

Lychgate is a market research and marketing consultancy company, specialising in the construction market. The company has an excellent knowledge and understanding of the dynamics of the industry, applying this expertise to tailored studies designed to meet clients' specific information requirements. Studies include customer satisfaction monitoring, image assessment, market share measurement, new product research, market profiling and brand awareness.

Offering telephone, in-store and on site interviews plus e-surveys and focus groups, Lychgate's research covers the breadth of the construction industry, from design professionals to main contractors, sub-contractors, developers, leading clients and end users.

Price: £495

Barbour

The Barbour Report 2006

Delivering product information online
An up-date for building product manufacturers

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