This report is intended to review the current state of the Building Documentation Industry based on responses and opinions from stakeholders.
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INTRODUCTION

Introduction

PRESIDENTS MESSAGE

I am pleased to present to you the seventh issue of the USIBD’s Cornerstone Report. This issue of the Cornerstone Report is our third annual report on the State of the Industry. This issue takes a close look at the financial performance in the Building Documentation Industry, adoption and implementation rates of new technology, as well as an assessment of upcoming opportunities.

Now, with three years of data to pull from, this issue begins to report on some of the trends regarding who is most heavily utilizing building documentation, where the most active regions are and what size projects seem to be most prevalent.

We will also provide answers of whether the rapid advancements in reality capture technologies are showing a trend that end users are beginning to self-perform more of their own building documentation, or does the data indicate that they are focusing more on their core businesses and leaving the documentation to the professionals.

We hope you will continue to participate in future Cornerstone Report surveys and invite your friends and colleagues to participate as well. On behalf of the USIBD’s Board of Directors and the Technology Committee, we hope you will enjoy this issue of the USIBD’S Cornerstone Report.

John Russo, AIA
President, USIBD
August 6, 2015
Interpretation of Data

1) WHAT PROJECT TYPES ARE UTILIZING BUILDING DOCUMENTATION?

- Building documentation for as-built conditions and renovations is a staple for the industry accounting for more than 70% of our project types, but new-build projects continue to steadily emerge as a source for opportunity. Reverse engineering and forensics are still niche representing only 15% of the project types being performed.

2) WHO IS USING BUILDING DOCUMENTATION SERVICES?

- Primary consumers continue to be large companies (100+ employees), representing 36% of the client base, but this only narrowly outpaces medium-sized companies (25 - 100 employees) which represent 31% of the market, making it the third consecutive year to show a decrease in large company client types.
3) WHERE ARE WE WORKING?

- We are converting opportunities into projects fairly evenly across the United States. The Northeastern and Southwestern are remain primary markets with nearly half of us working in these regions. But the Northwest, Midwest and Southeast regions are strong markets hosting more than 30% of our projects.

4) WHAT SIZE ARE OUR PROJECT BUDGETS?

- Smaller contracts (less than $5000) are still the minority showing a slight uptick from last year to 9% of our project work. 36% of our contracts range from $5000 to $25,000 while 38% range from $25,000 to $100,000. Roughly 10% of our contracts exceed $100,000.

5) HOW OFTEN ARE WE USING NEW TECHNOLOGY?

- New technology, such as laser scanning, augmented reality, UAV\drones, is being used frequently with more than half of us using it on 50% or more of our new projects. About 10% of us are finding an opportunity to use new technology on 25 – 50% of our projects, and about 25% of us either seldom use it, or don’t use it all.
6) WHO IS IN THE MARKET FOR NEW TECHNOLOGY?

• Our current utilization of new technology supports our expectations on acquiring or utilizing new technology on future projects, with 65% of us looking to employ new tools in the coming year on the majority of our projects. This correlation is strengthened by only 15% expecting it on less than half of projects and 15% not expecting to use it at all.

7) HOW SUCCESSFUL IS THE DOCUMENTATION?

• Many of us are realizing success on the majority of our documentation projects, we show a 60% success rate with only 35% of us being ‘somewhat successful’. Our somewhat successful projects are further qualified by more than 60% of us seeing an opportunity to provide more value to our clients beyond our initial scope and deliverables.
8) WHO IS EDUCATING THE INDUSTRY?

- The Industry learns the most when we get together! 64% of our learning and awareness comes from seminars/conferences and from peers. Only 15% is attributed to a formal education process and 22% from publications. Dust off that suitcase; it’s time to hit the conference circuit.

9) IS BUILDING DOCUMENTATION BEING SELF-PERFORMED (BY THE END USER)?

- We see a large shift in the probability of self-promoting happening this year. The likelihood of the end user performing the documentation in-house increased by almost 35%!

10) HOW SATISFIED ARE WE WITH THE EQUIPMENT MANUFACTURERS?

- Satisfaction ratings have been at steady levels for the last 3 years. 67% of us are at least satisfied, with 21% looking for more.
11) **WHAT STAGE OF A FACILITY’S LIFE CYCLE IS BEING DOCUMENTED?**
- The results show that buildings are twice more likely to be documented for pre-construction purposes than during construction or post construction. The results came in at a likeliness of 54%, 22% and 24% respectively.

12) **WHERE ARE THE AREAS FOR IMPROVEMENT?**
- When asked what would help us improve the industry the most, three specific areas came up over and over again in the responses. The respondents feel that the best ways to improve are:
  1) Recommended Standards
  2) Awareness
  3) Acceptance of new process and procedure

13) **HOW SUCCESSFUL ARE THE CURRENT PROCESSES OF DOCUMENTATION?**
- There’s a 40/60 split here. Most feel that their current process provides a successful end product/experience. 40% feel that the process is still somewhat successful but could be improved.

14) **WHAT AMOUNT OF VALUE IS STILL TO BE GAINED?**
- The Industry still recognizes a large potential for more value from our existing methods and results of documentation. The majority of respondents believe we’re realizing less than half of the actual value that could be derived from the information gathered.

15) **WHO’S CONTRIBUTING TO THE REPORT?**
- This report had contributions from stakeholders identifying with every type of group called out in the survey: Owners, Contractors, Trades, Architects, Engineers, Surveyors, Manufacturers and Service Providers. The groups with the best turnout were Service Providers, Surveyors, Architects and Engineers.
- More than 80% of the contributors are in a Management or Executive capacity.
- 54% of respondents work at companies with less than 25 employees. On the other end of the spectrum, 31% of respondents work at organizations with more than 100 employees.
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